

Tourism Sector Monitor ♦ January 2005

Room Revenue

Room revenues decreased in October (-2.3% *seasonally adjusted*), as all but three regions posted month-over-month declines. Revenues were down in the two largest regions Mainland/Southwest (-3.1%) and Vancouver Island/Coast (-2.0%). Nechako (-5.1%), Thompson-Okanagan (-2.5%) and Kootenay (-1.5%) also saw revenues fall through October.

Room revenues slipped in October

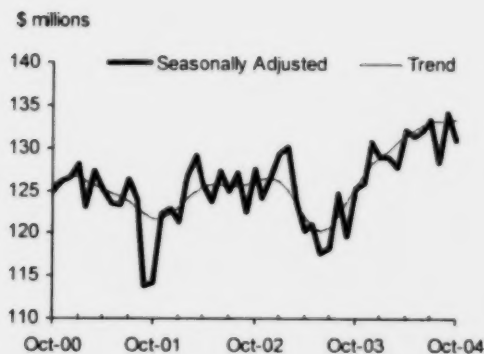


Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type			
	Oct 04 (\$000)	Sept 04 (\$000)	% change
Total	131,027	134,070	-2.3
Hotels	95,528	99,136	-3.6
Motels	16,250	16,050	+1.2
Other Acc.	18,961	19,293	-1.7
Regions (Top 3 performers)			
Northeast	4,498	4,294	+4.7
Cariboo	3,930	3,827	+2.7
North Coast	1,648	1,633	+0.9

Province-wide, revenues were down at very large hotels (with 251+ rooms, -8.4%) and

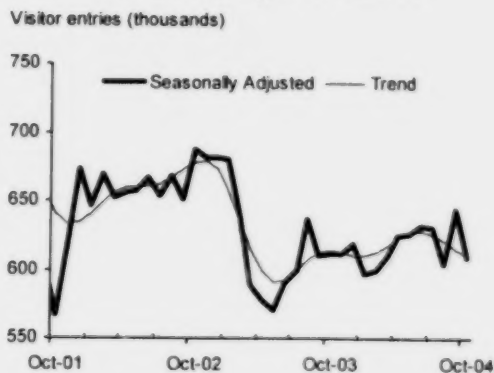
large hotels (with 151-250 rooms) (-2.5%). The greatest gain in October was recorded by motels (+1.2%).

Non-standard accommodation types (including bed and breakfast and other types of short-term accommodation) experienced a significant decline (-3.8%).

Visitor Entries

The volume of travellers entering Canada via BC border crossings fell 5.8% (*seasonally adjusted*) in October. The downturn experienced in visitor entries was due to a general weakness in both US (-6.6%) and overseas (-1.8%) travellers. The drop in the Australia/South Pacific market (-7.9%) was particularly sharp.

Visitor entries fell in October



In October, the number of Canadians returning to BC slipped (-0.4%) after a month of strong growth (+5.5%) in September. More Canadians (+3.4%) made same-day car trips south of the border, possibly due to a strong Loonie. However, overseas destinations were less popular in October as the number of Canadians returning from abroad experienced a sharp decline (-14.0%).

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues increased (+1.7%, *seasonally adjusted*) in November. All regions fared relatively well, particularly the Northeast (+10.2%), Thompson-Okanagan (+5.7%) and Kootenay (+4.5%). Revenues in Mainland/Southwest (+0.1%) and Cariboo (+0.1%) were virtually unchanged. Hotels with 151-250 rooms (+6.7%) and motels (+5.6%) had a strong performance in No-

vember, while smaller hotel with 1-75 rooms saw revenues slip. Visitor entries in BC fell 1.1% in November. Entries from the US edged up (+0.1%), with a drop in the number of same-day cross border excursions (-0.5%) partly offsetting an increase in overnight visits (+1.3%). Overseas entries decreased (-6.0%) in November.

Passenger traffic edged up at Victoria airport (+0.8%). There was some passenger (+0.9%) and vehicle (+1.5%) growth on BC Ferries.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

points to a change in Canadians' preference towards international travel.

Popular travel destinations for Canadians

Based on the latest statistics, Canadians are moving away from traditionally sought after US destinations. A few weeks south of the border simply does not do it for many Canadians any more.

Popular European destinations such as the U.K., France, Germany and Italy are still receiving attention from Canadians, but new ones are rapidly coming in to vogue.

In 2003, 684,000 Canadian residents crossed the UK's border, a 5.1% increase from 607,000 in 2002, which positioned the country as the second most popular destination for Canadian tourists.

The main attractions of Britain for Canadians remain history, heritage and culture, while some of the negative images are bad weather, lower comfort factors than in North America and a perception of the country as an expensive destination.

Although the demand for travel to the UK and Europe is still strong, especially from Ontario, Alberta and British Columbia, the growth in traffic in the long term will depend on economic conditions.

Top six non-US countries visited by Canadian residents, 2002 and 2003

Overnight Visits	2002		2003
	thousands		% Change
Mexico	607	716	17.9
UK	720	684	-5.1
France	505	509	0.7
Cuba	331	495	49.4
Dominican Republic	319	415	29.8
Germany	255	331	29.7

Source Statistics Canada

A growing number of Canadians are choosing different parts of the world as their travel destinations. In 2003, Mexico was the

most popular non-US destination, welcoming 716,000 Canadians, 17.9% more than in 2002. Mexico was the second most preferred destination in 2002 after the UK, receiving 607,000 visitors, an 11.8% drop from the previous year.

From 1992 to 2002 Mexico managed to attract close to 58% more Canadians due to a competitive advantage for leisure and business visitors alike. The Mexican government's support for business tourism, a wide diversity of attractions, a geographic location that caters to North American visitors, systematic promotion of the country abroad as well as improved visitor's security helped Mexico become a very popular destination, especially during winter months when Canadians travel to escape the cold weather.

Newly emerging travel destinations for Canadians

Over the last decade, an increasing number of Canadians travelled to Cuba and the Dominican Republic, substituting for sunny destinations such as Florida.

In 2003, 495,000 Canadians visited Cuba, close to a 50% increase from the previous year. The Dominican Republic was popular as well, welcoming 415,000 Canadians, an increase of over 29% from 2002. The increased popularity of these countries suggests a possible positive change of visitors' perceptions. More Canadians are choosing Cuba and the Dominican Republic as their leisure destination because they are perceived as safer, as well as good value for their money, than in the past.

It is difficult to say whether or not future trends in overseas travel will change dramatically. Further appreciation of the Canadian dollar and the close proximity of the two countries might help make the US more appealing to Canadian travellers.

Table 1: Room Revenue by Development Region (\$000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
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Annual data

1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681

Annual growth rates

1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3

Monthly data

Oct-03	23,355	67,765	18,061	6,258	3,734	1,614	757	3,773	125,317
Nov-03	23,507	68,545	18,035	6,018	3,672	1,633	716	3,759	125,886
Dec-03	23,921	69,966	19,822	6,482	3,762	1,747	726	4,214	130,640
Jan-04	25,241	68,731	18,647	6,410	3,614	1,685	717	3,961	129,006
Feb-04	23,965	69,361	18,644	6,588	3,676	1,654	724	4,228	128,839
Mar-04	23,660	68,803	18,903	6,189	3,838	1,593	618	4,181	127,785
Apr-04	23,795	72,919	18,561	6,540	3,646	1,669	795	4,160	132,085
May-04	23,585	72,896	18,923	6,135	3,655	1,617	732	3,826	131,369
Jun-04	24,068	73,308	18,585	6,219	3,778	1,669	740	3,852	132,219
Jul-04	24,347	73,170	18,945	6,459	3,789	1,715	730	4,159	133,313
Aug-04	24,184	69,590	18,104	6,180	3,848	1,681	716	3,999	128,302
Sep-04	24,786	73,680	18,717	6,382	3,827	1,633	752	4,294	134,070
Oct-04	24,280	71,421	18,249	6,288	3,930	1,648	713	4,498	131,027

Month-over-month growth rates

Oct-03	4.7	3.2	8.6	12.0	6.7	0.0	5.2	1.3	4.6
Nov-03	0.7	1.2	-0.1	-3.8	-1.7	1.2	-5.5	-0.4	0.5
Dec-03	1.8	2.1	9.9	7.7	2.5	7.0	1.5	12.1	3.8
Jan-04	5.5	-1.8	-5.9	-1.1	-3.9	-3.6	-1.3	-6.0	-1.3
Feb-04	-5.1	0.9	0.0	2.8	1.7	-1.8	1.0	6.7	-0.1
Mar-04	-1.3	-0.8	1.4	-6.1	4.4	-3.7	-14.7	-1.1	-0.8
Apr-04	0.6	6.0	-1.8	5.7	-5.0	4.8	28.6	-0.5	3.4
May-04	-0.9	0.0	2.0	-6.2	0.2	-3.1	-7.9	-8.0	-0.5
Jun-04	2.0	0.6	-1.8	1.4	3.4	3.2	1.1	0.7	0.6
Jul-04	1.2	-0.2	1.9	3.8	0.3	2.7	-1.4	8.0	0.8
Aug-04	-0.7	-4.9	-4.4	-4.3	1.6	-1.9	-1.9	-3.8	-3.8
Sep-04	2.5	5.9	3.4	3.3	-0.6	-2.8	5.0	7.4	4.5
Oct-04	-2.0	-3.1	-2.5	-1.5	2.7	0.9	-5.1	4.7	-2.3

October month-over-month percent growth

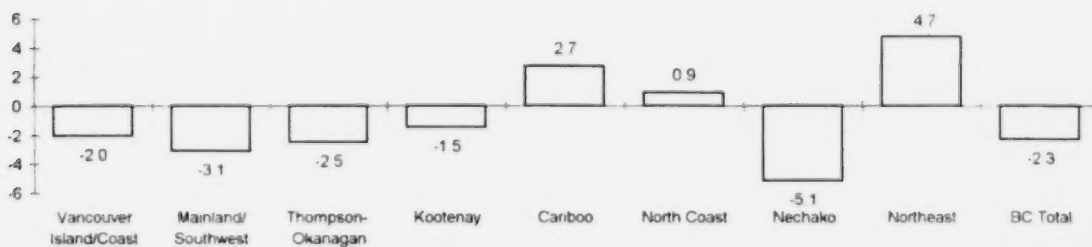


Table 2: Room Revenue by Accommodation Type (\$000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			

Annual data

1999	385,951	182,241	274,381	184,163	170,054	74,101	58,456
2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423

Annual growth rates

1999	5.4	15.3	15.3	12.9	2.2	19.2	12.0
2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9

Monthly data

Oct-03	36,747	15,436	25,624	14,625	15,545	9,580	7,969
Nov-03	36,600	15,655	25,840	14,583	15,347	10,124	7,621
Dec-03	38,425	15,977	25,594	14,851	16,836	10,805	8,777
Jan-04	36,486	15,847	25,910	15,061	15,731	9,824	8,232
Feb-04	36,802	15,530	25,980	14,766	15,735	10,070	8,034
Mar-04	38,358	16,133	26,139	14,858	15,823	8,981	7,368
Apr-04	39,791	15,678	26,620	15,266	15,647	10,214	7,962
May-04	40,043	16,199	26,741	15,272	15,690	10,412	7,886
Jun-04	39,601	16,544	26,782	15,479	15,970	10,365	8,007
Jul-04	38,335	16,334	26,959	15,694	16,267	10,571	8,391
Aug-04	36,989	16,093	26,017	15,297	15,251	10,445	8,177
Sep-04	39,882	16,769	26,710	15,775	16,050	10,692	8,601
Oct-04	36,550	16,355	26,741	15,882	16,250	10,691	8,270

Month-over-month growth rates

Oct-03	4.8	4.7	8.0	2.9	10.2	3.0	3.6
Nov-03	-0.4	1.4	0.8	-0.3	-1.3	5.7	-4.4
Dec-03	5.0	2.1	-1.0	1.8	9.7	6.7	15.2
Jan-04	-5.0	-0.8	1.2	1.4	-6.6	-9.1	-6.2
Feb-04	0.9	-2.0	0.3	-2.0	0.0	2.5	-2.4
Mar-04	4.2	3.9	0.6	0.6	0.6	-10.8	-8.3
Apr-04	3.7	-2.8	1.8	2.7	-1.1	13.7	8.1
May-04	0.6	3.3	0.5	0.0	0.3	1.9	-1.0
Jun-04	-1.1	2.1	0.2	1.4	1.8	-0.4	1.5
Jul-04	-3.2	-1.3	0.7	1.4	1.9	2.0	4.8
Aug-04	-3.5	-1.5	-3.5	-2.5	-6.2	-1.2	-2.5
Sep-04	7.8	4.2	2.7	3.1	5.2	2.4	5.2
Oct-04	-8.4	-2.5	0.1	0.7	1.2	0.0	-3.8

October month-over-month percent growth

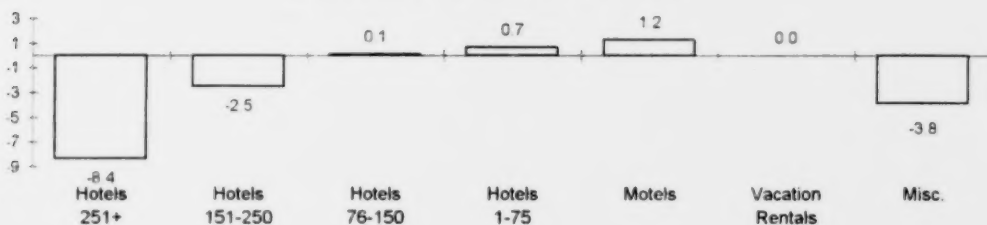


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Oct-04	YTD 04	Oct-03	YTD 03	Oct-04	Oct-03	Oct-04	Oct-03
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	12,659	152,532	5.3	8.3	170	8	8,230	296
Total - Hotels	10,568	124,523	5.5	9.1	67	0	5,542	201
76+ Rooms	7,908	95,464	1.3	10.3	26	1	3,937	236
1-75 Rooms	2,661	29,059	20.3	5.4	41	-1	1,605	-35
Motels	1,019	13,095	2.0	1.8	29	-2	1,071	-40
Vacation Rentals	274	4,717	8.9	-4.0	27	8	345	105
19 Cowichan Valley								
Total - All accommodation types	605	7,498	-3.3	2.4	33	1	639	3
Motels	122	1,692	0.5	7.0	16	1	315	19
21 Nanaimo								
Total - All accommodation types	2,693	34,458	10.1	5.6	70	4	2,566	-177
Total - Hotels	1,404	17,154	6.9	6.9	20	-1	1,244	-208
Motels	518	7,118	0.8	5.2	23	1	623	12
Vacation Rentals	684	8,566	32.7	5.3	20	3	572	15
23 Alberni-Clayoquot								
Total - All accommodation types	2,482	35,181	5.0	11.3	57	2	1,403	49
Total - Hotels	558	8,879	-1.9	13.6	11	2	406	25
Motels	248	3,691	31.3	3.2	19	-1	400	-10
Vacation Rentals	946	12,382	19.8	18.9	13	2	319	49
25 Comox-Strathcona								
Total - All accommodation types	1,858	27,774	1.6	5.9	55	-1	1,683	-39
Motels	547	6,659	0.1	5.6	22	-2	613	-55
Vacation Rentals	141	3,454	53.9	8.5	11	1	141	40
27 Powell River								
Total - All accommodation types	-	-	-	-	17	1	369	2
43 Mount Waddington								
Total - All accommodation types	257	5,025	-4.9	-2.4	19	0	594	-62
Total - Hotels	141	2,939	-10.4	-3.3	11	0	453	-65
45 Central Coast								
Total - All accommodation types	-	-	-	-	7	1	105	9
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	3,207	33,694	8.7	7.0	65	3	2,474	16
Total - Hotels	2,413	24,007	8.3	6.0	21	0	1,430	0
Motels	654	7,081	6.5	8.8	35	0	911	0
15 Greater Vancouver								
Total - All accommodation types	47,806	566,519	5.2	10.5	227	-5	26,109	293
Total - Hotels	45,542	533,733	4.6	10.6	157	-6	23,186	-220
251+ Rooms	25,280	293,218	3.0	11.0	25	0	9,956	0
151-250 Rooms	8,281	100,679	2.1	9.8	25	0	4,752	-1
76-150 Rooms	8,891	103,913	9.0	10.4	53	-1	5,764	-82
1-75 Rooms	3,090	35,923	12.9	10.0	54	-5	2,714	-137
Motels	1,368	15,503	20.7	9.2	36	0	1,596	67
Vacation Rentals	561	7,422	14.0	11.9	17	2	590	35
29 Sunshine Coast								
Total - All accommodation types	299	3,887	11.0	10.5	21	2	377	20
31 Squamish-Lillooet								
Total - All accommodation types	3,688	151,530	2.8	-6.4	95	5	7,377	348
Total - Hotels	3,140	123,147	5.5	-4.9	46	3	5,703	316
151+ Rooms	1,962	81,390	15.8	-6.6	11	1	3,429	272
76-150 Rooms	803	31,200	-9.5	-1.4	15	0	1,519	0
1-75 Rooms	374	10,557	-5.3	-1.3	20	2	755	44
Vacation Rentals	223	19,331	-24.1	-12.1	25	3	1,170	42
Miscellaneous	141	7,373	-8.4	-14.9	15	-1	287	-10
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	2,305	37,767	2.9	7.3	98	-6	2,962	-263
Total - Hotels	1,250	18,237	-1.5	4.3	14	-3	1,043	-217
Motels	927	15,796	11.1	11.4	68	-3	1,669	-23

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Oct-04	YTD 04	Oct-03	YTD 03	Oct-04	Oct-03	Oct-04	Oct-03
33 Thompson-Nicola								
Total - All accommodation types	3,776	56,580	1.4	12.9	157	2	5,452	39
Fishing lodges	113	1,426	8.1	-0.1	11	0	132	0
Total - Hotels	1,888	25,935	3.2	15.5	34	0	2,198	4
76+ Rooms	1,532	20,615	8.8	19.0	12	0	1,389	0
1-75 Rooms	355	5,320	-15.7	3.7	22	0	809	4
Motels	1,382	17,851	-6.1	14.8	77	1	2,306	41
Vacation Rentals	149	7,391	54.3	7.9	16	-2	442	-24
Miscellaneous	244	3,977	9.5	3.7	19	3	374	18
35 Central Okanagan								
Total - All accommodation types	4,678	61,989	-2.8	5.6	59	2	3,138	-18
Total - Hotels	3,480	40,763	-2.0	5.7	18	0	1,706	0
Motels	903	12,654	-13.0	2.8	23	-2	1,064	-88
Vacation Rentals	153	6,346	-12.6	8.6	14	2	192	33
37 North Okanagan								
Total - All accommodation types	1,032	16,710	-8.3	-2.6	42	-1	1,472	-53
Total - Hotels	564	9,443	-10.9	-5.5	12	0	775	0
Motels	428	5,496	4.0	20.0	18	-1	631	-11
39 Columbia-Shuswap								
Total - All accommodation types	2,153	35,196	16.9	8.3	93	1	3,144	-17
Total - Hotels	1,019	15,314	5.6	9.0	19	0	1,232	-3
Motels	979	12,962	28.5	10.5	46	-1	1,496	-39
Miscellaneous	104	3,840	12.6	4.7	19	1	299	19
Kootenay								
01 East Kootenay								
Total - All accommodation types	2,477	47,042	-5.6	6.7	106	0	4,095	-263
Total - Hotels	894	14,367	-7.0	1.1	24	-1	1,407	-49
Motels	799	10,253	-6.8	6.1	49	-3	1,128	-104
Vacation Rentals	160	10,162	7.2	17.4	14	2	898	73
03 Central Kootenay								
Total - All accommodation types	1,350	16,600	9.7	6.8	71	2	1,504	62
Total - Hotels	793	9,005	4.5	9.6	16	1	718	42
Motels	369	4,218	14.0	-4.0	28	-1	519	-1
Vacation Rentals	118	1,394	29.0	15.6	16	-1	121	-9
05 Kootenay Boundary								
Total - All accommodation types	426	5,421	8.9	7.9	31	-1	639	-11
Motels	279	3,112	11.0	9.0	21	-1	359	-11
Cariboo								
41 Cariboo								
Total - All accommodation types	1,540	15,672	4.1	3.5	87	-8	1,959	-86
Motels	845	7,899	0.4	3.6	37	-2	1,056	-93
Vacation Rentals	48	1,048	-22.8	-14.6	19	-3	202	25
Miscellaneous	159	1,432	25.4	6.4	12	-2	137	-12
53 Fraser-Fort George								
Total - All accommodation types	2,456	24,794	7.0	7.3	51	-1	2,381	-37
Total - Hotels	1,737	17,143	4.6	5.8	18	0	1,392	0
Motels	647	6,669	9.8	11.5	27	-1	894	-73
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	523	11,260	2.0	3.2	29	0	953	0
49 Kitimat-Stikine								
Total - All accommodation types	704	7,233	1.5	7.6	34	-1	795	-31
Motels	244	2,556	0.2	1.0	16	0	369	-27
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	885	7,765	-8.1	-2.2	53	-2	1,175	-28
Motels	483	4,320	-5.4	-3.5	25	1	669	13
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	4,044	42,648	17.1	8.0	68	1	3,588	746
Total - Hotels	2,061	20,850	25.7	23.8	23	3	1,579	145
Motels	1,189	10,398	15.1	9.8	32	0	886	-15

"-" Data for regions with fewer than 10 properties reporting can not be released.

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Oct-04	YTD 04	Oct-03	YTD 03	Oct-04	Oct-03	Oct-04	Oct-03
Vancouver Island/Coast	20,896	268,321	5.0	8.0	428	16	15,589	81
Victoria (C)	9,993	120,805	1.3	8.6	79	1	5,560	217
Other CRD	2,666	31,727	23.4	7.3	91	7	2,670	79
Nanaimo (C)	1,542	17,430	9.6	7.6	22	1	1,216	20
Port Alberni (C)	268	3,431	16.9	10.0	13	2	349	19
Courtenay (C)	637	7,159	4.0	3.8	11	1	453	30
Rest of Development Region	5,790	87,769	2.8	7.8	223	5	5,341	-284
Mainland/Southwest	55,001	755,629	5.2	6.5	408	5	36,337	677
Downtown Vancouver (C)	30,680	366,832	2.3	11.4	84	-1	12,826	-135
Other Vancouver (C)	2,196	28,745	8.1	5.0	30	-5	2,645	-125
Richmond (C)	7,395	85,322	10.6	9.7	24	1	4,371	50
Burnaby (C)	2,076	23,547	11.4	9.3	12	1	1,635	381
Other GVRD	5,460	62,073	11.8	9.1	77	-1	4,632	83
Whistler (DM)	3,238	145,641	6.1	-6.5	69	4	6,763	325
Rest of Development Region	3,957	43,469	5.4	5.9	112	6	3,465	98
Thompson/Okanagan	13,944	208,243	1.0	7.5	449	-3	16,168	-317
Penticton (C)	1,547	22,220	3.2	8.5	43	-1	1,655	-202
Kamloops (C)	2,683	42,771	0.9	16.2	67	4	3,642	115
Kelowna (C)	4,221	55,041	-6.4	5.2	49	1	2,692	-23
Vernon (C)	939	15,399	-8.1	-3.2	28	-1	1,301	-53
Revelstoke (C)	773	13,062	10.0	6.7	29	0	1,246	-8
Rest of Development Region	3,782	59,750	10.8	6.7	233	-6	5,632	-146
Kootenay	4,252	69,063	0.2	6.8	208	1	6,238	-212
Cranbrook (C)	584	7,099	-31.0	0.5	17	0	787	-7
Nelson (C)	463	5,760	-1.3	4.7	12	0	425	-2
Rest of Development Region	3,205	56,204	9.4	7.9	191	1	5,451	-205
Cariboo	3,996	40,466	5.9	5.8	138	-9	4,340	-123
Quesnel (C)	293	3,096	-20.1	1.2	13	0	452	0
Williams Lake (C)	470	4,269	19.4	5.9	11	-1	534	-87
Prince George (C)	1,945	18,223	3.7	5.2	27	0	1,655	-33
Rest of Development Region	1,288	14,879	13.1	7.6	87	-8	1,699	-3
North Coast	1,227	18,493	1.7	4.9	63	-1	1,748	-31
Prince Rupert (C)	400	6,450	-1.1	4.1	16	0	773	0
Terrace (C)	429	4,094	2.1	9.7	12	0	386	0
Rest of Development Region	398	7,949	4.2	3.2	35	-1	589	-31
Nechako	885	7,765	-8.1	-2.2	53	-2	1,175	-28
Smithers (T)	451	3,765	-5.3	2.4	16	-1	442	15
Rest of Development Region	434	4,000	-10.9	-6.1	37	-1	733	306
Northeast	4,044	42,648	17.1	8.0	68	1	3,588	746
Dawson Creek (C)	654	5,664	11.1	16.5	13	-1	486	-9
Fort St. John (C)	1,576	17,271	26.9	17.9	19	0	1,569	73
Rest of Development Region	1,815	19,714	11.7	-1.3	36	2	1,533	682

"-" Data for regions with fewer than 10 properties reporting can not be released.

Table 5: Historical Unadjusted Room Revenue by Development Region (\$000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
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Annual data

1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681

Annual growth rates

1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3

Monthly data

Oct-03	19,909	52,270	13,801	4,244	3,775	1,207	963	3,455	99,623
Nov-03	12,753	41,418	8,039	2,484	2,622	903	538	2,967	71,724
Dec-03	11,763	53,336	11,652	5,024	2,199	831	454	3,803	95,060
Jan-04	10,891	59,523	12,523	5,875	2,276	791	415	4,428	96,722
Feb-04	14,125	68,452	15,086	8,185	2,450	1,033	459	6,323	116,112
Mar-04	17,288	74,357	15,792	7,768	3,224	1,040	507	6,565	126,540
Apr-04	19,495	63,507	12,696	5,004	3,223	1,056	545	3,660	109,186
May-04	25,608	71,530	18,051	4,761	3,831	1,504	652	2,397	128,335
Jun-04	31,380	81,609	21,957	5,917	4,691	2,786	981	3,231	152,553
Jul-04	44,238	98,085	37,572	9,647	5,469	3,434	1,051	3,896	203,393
Aug-04	49,331	101,632	37,084	10,120	6,097	3,253	1,098	4,029	212,643
Sep-04	35,071	81,932	23,539	7,535	5,209	2,367	1,171	4,075	160,900
Oct-04	20,896	55,001	13,944	4,252	3,996	1,227	885	4,044	104,245

Year-over-year percent changes

Oct-03	7.0	-5.8	3.1	7.1	1.4	5.2	-6.5	8.4	-0.9
Nov-03	7.1	-0.9	7.6	0.0	-0.5	4.4	-8.1	18.7	2.1
Dec-03	4.6	0.0	12.7	13.6	6.6	27.1	3.0	70.9	4.8
Jan-04	13.9	-4.4	3.3	8.0	1.1	8.0	-6.0	10.5	-0.1
Feb-04	9.7	-5.5	11.6	12.1	8.4	6.9	-14.0	24.7	1.0
Mar-04	3.8	1.4	7.0	0.3	7.8	-7.2	-15.9	-4.2	2.0
Apr-04	5.9	14.1	6.7	15.2	1.0	5.0	7.0	4.8	10.8
May-04	4.7	11.6	10.5	1.7	1.3	4.3	-2.1	-2.2	8.8
Jun-04	9.0	17.0	2.6	5.0	4.6	6.8	5.7	12.0	11.8
Jul-04	12.4	13.9	14.3	11.6	5.8	10.7	-0.7	3.6	12.9
Aug-04	5.0	0.4	0.2	1.5	9.5	4.7	-3.8	1.3	1.7
Sep-04	11.5	12.9	17.6	13.1	9.1	1.2	7.3	15.2	13.0
Oct-04	5.0	5.2	1.0	0.2	5.9	1.7	-8.1	17.1	4.6

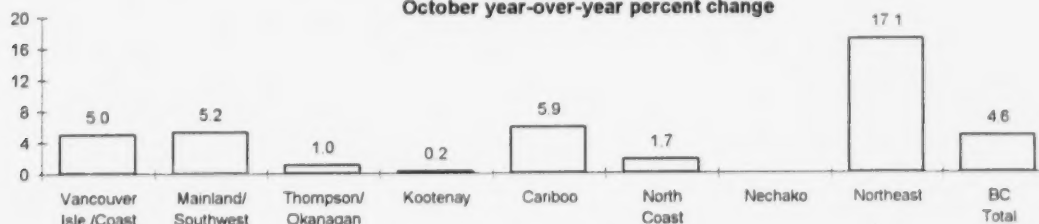
October year-over-year percent change


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**

Annual data

1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,970.8	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.8	118.0
2003	7,335.3	6,137.4	2,580.7	3,556.7	1,197.8	577.6	410.1	124.8

Annual percent changes

1999	5.4	4.8	7.9	2.0	8.6	9.7	7.8	6.6
2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.1	-4.3	-13.8	4.2	-3.0	4.4	-11.7	-10.5
2003	-8.0	-7.0	-8.1	-6.1	-12.9	-24.4	-0.4	5.8

Monthly data

Nov-03	609.2	503.6	211.4	289.8	105.6	54.7	35.6	10.3
Dec-03	612.8	504.7	210.7	291.7	108.1	56.4	34.7	11.1
Jan-04	594.5	485.0	204.8	286.7	109.5	56.5	34.3	11.8
Feb-04	600.5	489.7	206.1	288.0	110.8	56.4	35.2	10.9
Mar-04	611.0	504.8	210.3	299.3	106.2	58.3	35.1	9.1
Apr-04	625.6	509.3	210.0	301.3	116.3	62.2	35.6	11.6
May-04	627.2	503.6	204.1	300.1	123.6	64.4	38.0	13.0
Jun-04	635.1	510.6	211.6	298.6	124.5	66.2	38.1	12.7
Jul-04	629.6	509.0	211.9	297.8	120.6	58.3	40.2	12.8
Aug-04	610.1	495.5	202.6	294.0	114.6	54.5	37.2	12.5
Sep-04	644.6	528.1	205.2	305.4	116.5	56.6	38.7	12.6
Oct-04	607.5	493.1	202.6	296.0	114.3	56.8	37.7	11.6
Nov-04	600.9	493.4	201.5	300.0	107.4	54.4	34.7	12.0

Month-over-month growth rates

Nov-03	-0.6	-1.1	-2.6	-2.4	1.0	6.0	7.9	2.8
Dec-03	0.6	0.2	-0.3	0.6	2.4	3.1	-2.5	7.6
Jan-04	-3.0	-3.9	-2.8	-1.7	1.2	0.1	-1.2	6.3
Feb-04	1.0	1.0	0.7	0.5	1.2	-0.3	2.7	-7.5
Mar-04	1.8	3.1	2.0	3.9	-4.1	3.3	-0.3	-16.3
Apr-04	2.4	0.9	-0.2	0.7	9.5	6.7	1.5	27.2
May-04	0.3	-1.1	-2.8	-0.4	6.3	3.6	6.7	12.0
Jun-04	1.3	1.4	3.7	-0.5	0.7	2.8	0.3	-2.0
Jul-04	-0.9	-0.3	0.1	-0.3	-3.1	-11.9	5.4	0.4
Aug-04	-3.1	-2.7	-4.4	-1.3	-5.0	-6.5	-7.5	-2.0
Sep-04	5.7	6.6	1.3	3.9	1.6	3.9	4.2	0.8
Oct-04	-5.8	-6.6	-1.3	-3.1	-1.8	0.4	-2.7	-7.9
Nov-04	-1.1	0.1	-0.5	1.3	-6.0	-4.3	-8.0	2.9

* Seasonal adjustment of total US entries are calculated by Statistics Canada and are adjusted to sum to national totals, therefore same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)					Other Transportation (000s)		
	Vancouver				Victoria	BC Ferries		Coquitlam Hwy Passenger Vehicles
	Total	Domestic	Trans- border	Other Int'l.		Vehicles	Passengers	

Annual data

1999	15,807	8,314	4,120	3,373	1,191	7,852	21,389	2,388
2000	16,033	8,306	4,074	3,653	1,139	7,887	21,280	2,400
2001	15,477	7,868	4,001	3,608	1,158	8,104	21,309	2,461
2002	14,878	7,422	3,855	3,600	1,102	8,272	21,540	2,530
2003	14,322	7,267	3,814	3,241	1,183	8,253	21,348	2,480

Annual growth rates

1999	1.9	1.2	-0.1	6.4	-1.9	0.4	-0.2	0.5
2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.7	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.8	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0

Monthly data

Nov-03	1,253	628	325	300	104	684	1,757	196
Dec-03	1,269	645	324	300	106	645	1,680	210
Jan-04	1,253	633	321	299	104	680	1,753	197
Feb-04	1,284	663	327	294	108	712	1,819	213
Mar-04	1,277	650	328	299	102	717	1,839	222
Apr-04	1,305	654	339	312	105	713	1,865	220
May-04	1,318	658	331	328	103	701	1,823	215
Jun-04	1,324	669	324	331	103	702	1,812	213
Jul-04	1,313	671	320	322	104	706	1,822	217
Aug-04	1,299	656	327	315	100	695	1,776	207
Sep-04	1,338	683	337	318	109	711	1,834	221
Oct-04	1,311	667	332	312	104	715	1,851	213
Nov-04	1,327	680	334	312	104	726	1,868	220

Month-over-month growth rates

Nov-03	1.9	0.5	2.5	4.3	-1.1	-1.2	-1.0	-10.0
Dec-03	1.3	2.6	-0.2	0.1	1.9	-5.7	-4.4	6.9
Jan-04	-1.3	-1.8	-1.0	-0.5	-1.6	5.3	4.4	-6.3
Feb-04	2.5	4.7	2.0	-1.5	1.3	4.7	3.8	8.1
Mar-04	-0.6	-1.9	0.2	1.4	-3.2	0.7	1.1	4.2
Apr-04	2.2	0.6	3.4	4.5	2.3	-0.5	1.4	-0.7
May-04	0.9	0.7	-2.4	5.1	-1.6	-1.7	-2.3	-2.4
Jun-04	0.5	1.6	-2.2	0.9	0.6	0.1	-0.6	-1.1
Jul-04	-0.8	0.3	-1.2	-2.7	0.9	0.5	0.5	2.3
Aug-04	-1.1	-2.2	2.3	-2.1	-3.9	-1.5	-2.5	-4.7
Sep-04	3.0	4.1	2.8	0.9	9.2	2.2	3.3	6.6
Oct-04	-2.0	-2.3	-1.3	-2.0	-5.4	0.6	0.9	-3.4
Nov-04	1.2	2.0	0.7	0.1	0.8	1.5	0.9	3.2

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel Industry ²		Consumer Price Index ¹	
	Total tourism related	Air transport ⁴	Accommodation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%) ³	Room Rate (\$)	Traveller accom- modation	Restaurant food ⁴
Annual data									
1999	181.7	15.3	29.2	110.1	27.1	61.7	112.04	133.1	115.6
2000	188.4	14.8	28.2	116.7	28.8	60.0	114.05	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.12	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	117.00	124.1	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	113.74	111.9	127.6
Annual Growth Rates									
1999	-1.5	-3.6	-0.5	0.4	-8.5	-0.2	3.2	2.4	1.5
2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.6	0.8	-6.9	3.4
2003	1.1	4.4	-0.7	-0.3	6.8	-1.0	-2.8	-9.9	1.8
Monthly data									
Nov-03	192.9	12.6	28.5	118.6	33.2	60.3	114.10	107.6	128.7
Dec-03	194.0	12.2	28.3	120.2	33.2	60.7	114.70	106.5	128.6
Jan-04	194.9	12.8	27.7	120.7	33.8	60.3	114.00	104.0	128.9
Feb-04	193.8	13.0	27.6	119.8	33.4	59.1	113.40	102.8	129.0
Mar-04	193.6	12.7	27.6	118.4	35.0	61.1	113.60	102.9	129.2
Apr-04	192.4	12.7	27.7	117.5	34.4	62.0	115.90	102.7	129.6
May-04	192.7	12.8	28.4	117.3	34.2	61.7	115.80	102.4	129.8
Jun-04	192.3	13.2	27.6	117.5	34.0	62.4	115.60	102.2	129.8
Jul-04	191.8	13.0	27.6	116.8	34.4	61.5	116.00	101.6	129.8
Aug-04	193.2	13.2	27.3	117.3	35.3	58.9	115.80	100.3	129.7
Sep-04	192.9	13.2	27.5	116.7	35.5	62.1	116.60	101.0	129.9
Oct-04	190.3	13.4	27.2	115.0	34.7	61.7	115.90	100.4	130.2
Nov-04	191.6	13.3	26.4	116.8	35.2	62.4	117.00	102.8	130.5
Month-over-month growth rates									
Nov-03	1.7	0.0	-0.1	2.0	2.8	0.7	-0.9	-2.3	0.3
Dec-03	0.5	-3.4	-0.7	1.4	0.1	0.4	0.5	-1.0	-0.1
Jan-04	0.5	4.7	-2.3	0.4	1.7	-0.4	-0.6	-2.3	0.2
Feb-04	-0.6	1.5	-0.4	-0.7	-1.1	-1.2	-0.5	-1.2	0.1
Mar-04	-0.1	-1.7	-0.1	-1.2	4.6	2.0	0.2	0.1	0.2
Apr-04	-0.6	-0.2	0.6	-0.7	-1.6	0.9	2.0	-0.2	0.3
May-04	0.2	0.7	2.5	-0.2	-0.7	-0.3	-0.1	-0.3	0.2
Jun-04	-0.2	3.1	-3.0	0.2	-0.5	0.7	-0.2	-0.2	0.0
Jul-04	-0.2	-1.5	0.2	-0.5	1.0	-0.9	0.3	-0.6	0.0
Aug-04	0.7	1.5	-1.2	0.4	2.9	-2.6	-0.2	-1.3	-0.1
Sep-04	-0.1	0.3	0.7	-0.5	0.5	3.2	0.7	0.7	0.2
Oct-04	-1.3	0.8	-0.8	-1.4	-2.2	-0.4	-0.6	-0.6	0.2
Nov-04	0.7	-0.6	-3.1	1.6	1.2	0.7	0.9	2.4	0.2

¹Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

²Source: Pannell Kerr Forster and BC Stats

³Occupancy Rate change expressed as percentage point change

⁴No identifiable seasonality

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns ¹					
	Receipts (\$ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services

Annual data

1999	4,467.5	369.3	4,097.8	28,143.9	2,038.3	26,105.6
2000	4,831.5	358.9	4,472.6	30,244.5	2,210.4	28,034.1
2001	5,176.3	357.9	4,818.4	32,231.1	2,280.9	29,950.2
2002	5,101.2	305.9	4,795.3	33,134.7	2,241.2	30,893.5
2003	5,388.8	284.4	5,104.3	33,648.9	2,089.1	31,559.8

Annual growth rates

1999	-3.7	-7.3	-3.4	4.3	12.9	3.6
2000	8.1	-2.9	9.1	7.5	8.4	7.4
2001	7.1	-0.3	7.7	6.6	3.2	6.8
2002	-1.5	-14.6	-0.5	2.8	-1.7	3.1
2003	5.6	-7.0	6.4	1.6	-6.8	2.2

Monthly data

Apr-03	427	24	403	2,722	178	2,544
May-03	430	24	406	2,774	173	2,602
Jun-03	430	24	406	2,778	175	2,603
Jul-03	451	24	427	2,794	181	2,612
Aug-03	460	24	436	2,820	174	2,646
Sep-03	464	23	441	2,828	168	2,660
Oct-03	470	22	448	2,866	168	2,698
Nov-03	477	23	454	2,887	169	2,717
Dec-03	478	24	454	2,882	167	2,715
Jan-04	479	22	456	2,869	158	2,711
Feb-04	485	23	463	2,923	166	2,757
Mar-04	498	23	475	2,941	169	2,771
Apr-04	518	24	494	2,949	167	2,781

Month-over-month growth rates

Apr-03	-0.5	3.8	-0.8	-1.5	0.6	-1.6
May-03	0.6	-3.0	0.8	1.9	-3.1	2.3
Jun-03	0.1	1.4	0.0	0.1	1.3	0.0
Jul-03	5.0	1.3	5.2	0.6	3.5	0.4
Aug-03	2.0	-1.1	2.2	0.9	-3.9	1.3
Sep-03	0.7	-6.1	1.1	0.3	-3.6	0.5
Oct-03	1.4	-1.8	1.5	1.4	0.3	1.4
Nov-03	1.5	2.3	1.4	0.7	0.5	0.7
Dec-03	0.2	4.7	-0.1	-0.2	-1.4	-0.1
Jan-04	0.2	-5.5	0.5	-0.5	-5.4	-0.2
Feb-04	1.4	1.2	1.4	1.9	5.3	1.7
Mar-04	2.5	1.3	2.6	0.6	1.9	0.5
Apr-04	4.1	5.9	4.0	0.3	-1.3	0.4

¹Source: Statistics Canada & BC Stats



NUMBER

NUMÉRO

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Tourism Sector Monitor ♦ February 2005

Room Revenue

Room revenues rebounded in November (+2.0% *seasonally adjusted*), as all development regions fared relatively well. Thompson-Okanagan was the major engine of revenue growth (+6.1%), supported by Northeast (+10.4%), Kootenay (+4.9%) and Nechako (+3.1%). Revenues in Vancouver Island/Coast (+2.0%), the second largest region, also helped boost overall growth. However, properties in Mainland/ Southwest (+0.2%) and Cariboo (+0.1%) saw virtually no change.

Room revenues increased in November

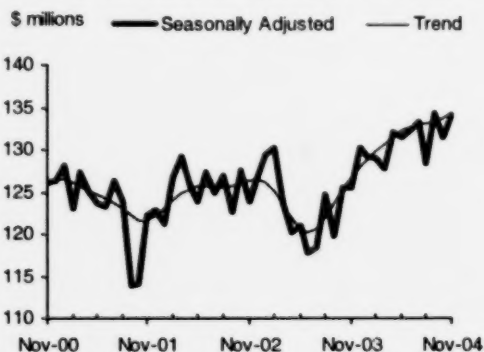


Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type			
	Nov 04 (\$000)	Oct 04 (\$000)	% change
Total	134,069	131,455	+2.0
Hotels	97,530	95,863	+1.7
Motels	17,352	16,285	+6.6
Other Acc.	19,730	19,149	+3.0
Regions (Top 3 performers)			
Northeast	5,023	4,548	+10.4
Thompson/Okanagan	19,712	18,581	+6.1
Kootenay	6,701	6,387	+4.9

Large hotels (151-250 rooms, +6.7%) posted the strongest growth in November. Revenues at very large hotels (251+ rooms, +0.2%) were flat, while small hotels (1-75 rooms, -1.8%) saw revenues slip.

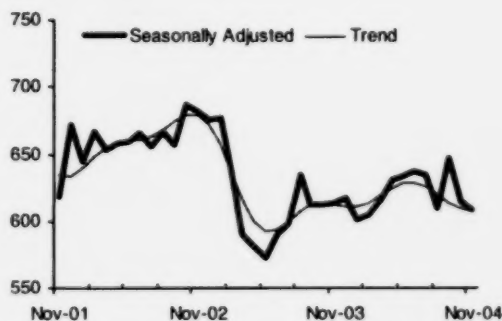
Motels (+6.6%) and non-standard accommodation types—bed and breakfast, work camps and resorts—experienced a strong November (+3.0%).

Visitor Entries

In contrast to revenues, the volume of travellers entering Canada via BC border crossings continued to decline, dropping 0.4% (*seasonally adjusted*) largely due to a downturn in entries by overseas travellers (-4.8%). European visitor entries dropped (-10.2%) due to a decrease in travellers from Germany (-21.0%) and the UK (-5.4%). The overall drop of 4.0% in the number of Asian visitors was due to substantially fewer entries from Taiwan (-24.9%) and Japan (-2.0%). The number of visitors from Australia, New Zealand and the South Pacific rose 3.2%

Visitor entries slipped in November

Visitor entries (thousands)



	Nov-04 (000)	Oct-04 (000)	% chg from Oct-04
American visitors			
Total	496	493	0.6
Same-day	202	203	-0.7
Overnight	299	295	1.4
Overseas visitors			
Total	111	117	-4.8
Europe	36	40	-10.2
UK	18	19	-5.4
Asia	56	58	-4.0
Japan	19	19	-2.0
Taiwan	7	9	-24.9
Oceania	12	12	3.2

Note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Overall entries from the US stayed fairly flat (+0.6%), as an increase in overnight visits (+1.4%) was offset by fewer same-day trips (-0.7%) to BC.

Canadian travel abroad rebounded (+4.3%) after dipping in October (-0.5%). Canadians made more trips to the US (+4.5%) and other destinations (+2.0%) in November.

Other Indicators

In the hotel industry, both average room rates (+1.0%) and hotel occupancy (+0.8 percentage points) increased in November.

Employment in key tourism-related industries increased moderately (+1.6%) in November, led by increases in the arts, entertainment and recreation (+3.5%) as well as the food and beverage service industry (+1.8%). The air transport (-0.8%) and accommodation (-0.7%) industries, saw modest job losses.

The Consumer Price Index for traveller accommodation increased (+1.2%), while the cost of restaurant food edged up marginally (+0.2%).

Transportation indicators were weak in November. The number of passengers at both the Vancouver (+0.7%) and Victoria

(+0.9%) airports edged up. There was modest growth in the number of vehicles (+1.7%) and passengers (+1.0%) aboard BC Ferries in November.

On the Coquihalla Highway, 3.1% more passenger vehicles passed through the toll-booths in November.

The Canadian dollar continued to appreciate, increasing to 0.84 US\$ in November.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Nov-04	Change from Oct-04
Hotel Industry		
Occupancy rate	62.9	0.8 pp.
Average room charge	117.30	1.0%
(Pannell Kerr Forster)		
Airport Passengers (000s) (%)		
Vancouver International Airport		
Total traffic	1,329	0.7
US (trans-border)	333	0.8
Other International	315	0.2
Canada (domestic)	682	0.8
(YVR)		
Victoria International Airport		
Total traffic	104	0.9
(Victoria Airport Authority)		
Transportation (000s) (%)		
Coquihalla Highway		
Passenger Vehicles	221	3.1
(Ministry of Transportation & Highways)		
BC Ferries		
Vehicle Volume	729	1.7
Passenger Volume	1,870	1.0
(BC Ferries)		
Exchange Rates Cdn \$		
US \$	0.836	0.03
UK Pound	0.449	0.01
Japanese Yen	87.458	0.23
Australian \$	1.084	-0.01
(Statistics Canada)		

Note: pp. percentage points

Note to readers: all data in the *Tourism Sector Monitor* are now reported on a seasonally adjusted basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues increased (+2.1%, seasonally adjusted) in December with a mixed performance across development regions and accommodation types. Cariboo (+18.8%) was the main engine of revenue growth, followed by Mainland/ Southwest (+2.8%) and Vancouver Island/Coast (+2.7%). Revenues declined sharply in North Coast (-11.8%) and Northeast (-6.9%).

Revenues rose at hotels with 250 or more rooms (+12.4%) in December, while all the other accommodation types posted declines. Vacation rentals were virtually unchanged. Visitor entries bounced back 0.3% in December largely due to an increase in visits from overseas (+2.2%). Entries from the US were flat (-0.1%), with virtually no change in the number of same-day cross-border excursions (-0.1%) and a drop in overnight visits (-1.6%).

Passenger traffic increased at Victoria (+2.2%) as well as Vancouver (+1.0%) airports. There were more passenger vehicles aboard BC Ferries (+2.9%), but fewer on the Coquihalla Highway (-2.2%)

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

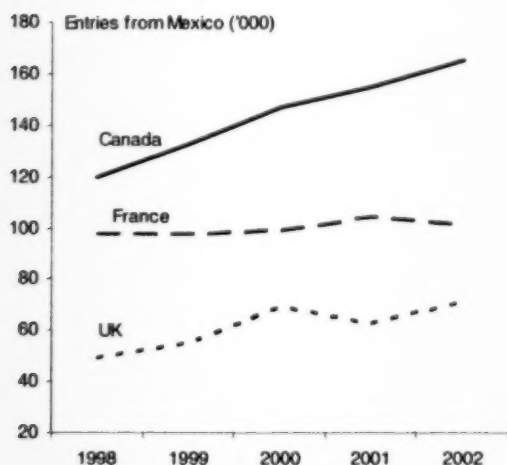
How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

Special Focus: Mexico a growing overseas market for both BC and Canada

A growing number of Mexicans, close to 13 million in 2004, went abroad, suggesting that foreign travel is a growing consumer pastime among Mexicans.

In 2002, close to 12 million Mexicans travelled abroad. Approximately 80% of them took short trips by car across the US border within the "free mile zone," mainly to go shopping. Mexicans travelling within the free mile zone do not require visitors' visa, or passports to enter the US. There are, however, an estimated 3 million Mexicans who travel further afield for pleasure, business and to visit friends and family.

Mexicans choose Canada over European favourites



Data Source: World Tourism Organization

Not surprisingly, the US is the favourite destination of Mexican tourists. This is partly because the US and Mexico are neighbouring states, and their close proximity means that many Mexicans do not have to travel far to visit the US. Mexican immigrants to the US also attract visits from friends and family who live south of the border.

The cumbersome entry requirements could deter travel from Mexico to the US, creating an opportunity for Canada to pick up some of the slack.

Many Mexicans are interested in Canada, and perceive it as safe and less expensive than their own country. However, the interest has not translated into a higher market share for Canada, possibly due to lack of awareness about attractions and activities offered in Canada.

In December 2004, the Canadian Tourism Commission's (CTC's) board of directors approved an increase in marketing investment of \$600,000 for Mexico. The extra marketing dollars are expected to help better position Canada in the Mexican tourism market.

How do Mexicans spend their time while on holiday?

Mexicans travel not only for recreational purposes, but also for educational reasons. Travel abroad means that they can experience other cultures, with their traditions and history, and is viewed by many as an investment in the future of their children. Many Mexicans visit museums, art galleries, cultural events and festivals when they travel to Canada. They also like participating in sporting events and, not surprisingly, winter activities are also popular. Some Canadian tour operators have reported increasing interest in ski packages to Canada over the last few years.

Travel from Mexico to Canada is increasing

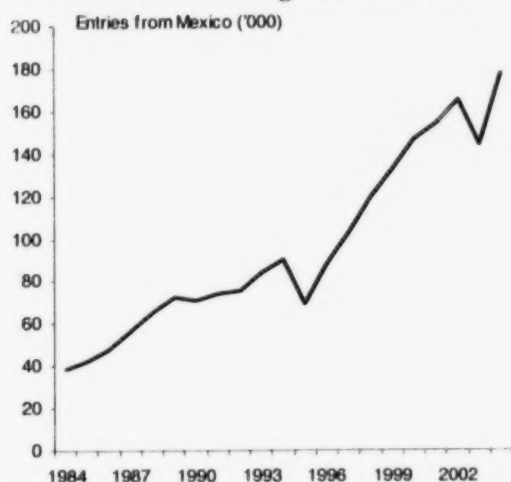
In 2004, over 177,000 Mexicans travelled to Canada, exceeding the peak of 165,000 visitors recorded in 2002 before the peso slipped. Outbound travel from Mexico to

Canada expanded a hefty 23% in 2004, from 144,000 visitors in 2003. Travel from Mexico to Canada jumped from 38,820 visitors in 1984 to over 177,000 in 2004.

Canada's profile as a tourist destination is on the rise in Mexico partly due to various tourism agencies and organizations marketing efforts to attract a higher number of tourists from Mexico. The Canadian Tourism Commission's Market Priorities Assessment (MPA) ranked Mexico as Canada's fifth-largest inbound tourism market.

The number of outbound travellers has also increased due to Mexico's success in stabilizing its economy and achieving a less-volatile currency by emerging market standards.

Canada is attracting more Mexicans



Data Source: Statistics Canada

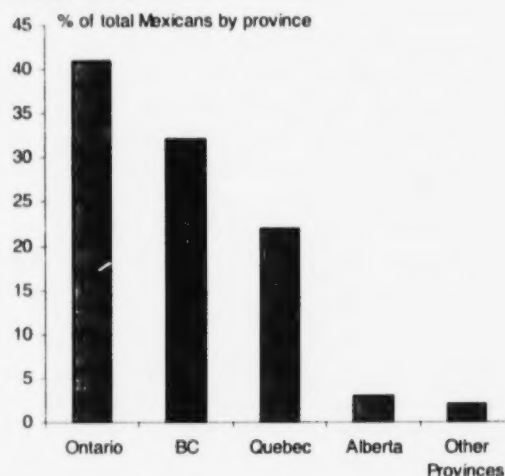
A small portion of the increase in visitors over the years might also be attributed to the more than 10,000 Mexicans working in Canada each year to help fill worker shortages in agriculture and construction.

BC is the second most popular Canadian destination for Mexicans

In 2004, 56,500 Mexican visitors came to BC, a 6.4% increase from the previous year, representing 32% of the total Mexican visitors

to Canada. Mexicans entering via BC border crossings represent 0.8% of the total number of travellers coming to BC. Ontario ranks first as the favourite destination of Mexican tourists, receiving close to half of the Mexican tourists arriving at Canadian national borders.

One in three Mexicans visiting Canada comes to BC



Data Source: Statistics Canada

This is most likely due to a higher concentration of Mexican immigrants in Ontario compared to BC. Mexico was Ontario's fifth-largest foreign tourism market in 2004, welcoming 73,200 thousand Mexicans, a 36% increase from the previous year.

Quebec is the third most preferred province, receiving 22% of Mexican outbound travellers with approximately 38,200 arrivals last year. All the other provinces receive only 2% of total Mexican inbound travel to Canada; however, most provinces experienced double-digit growth between 2003 and 2004.

The Tourism Industry has recovered in 2004 from the severe hits received in 2003. Most of the traditional overseas markets bounced back, and with new emerging ones such as Mexico and Mainland China, the future looks bright.

Table 1: Room Revenue by Development Region (\$000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
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Annual data

1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681

Annual growth rates

1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3

Monthly data

Nov-03	23,393	68,780	17,834	5,816	3,656	1,622	711	3,758	125,571
Dec-03	23,821	70,075	19,479	6,441	3,760	1,748	726	4,190	130,239
Jan-04	25,280	68,807	18,686	6,407	3,613	1,686	717	3,933	129,129
Feb-04	23,963	69,372	18,719	6,701	3,676	1,655	725	4,238	129,048
Mar-04	23,668	68,798	18,889	6,192	3,841	1,594	617	4,168	127,769
Apr-04	23,815	72,874	18,604	6,566	3,651	1,671	794	4,142	132,117
May-04	23,617	72,823	18,921	6,147	3,661	1,619	732	3,835	131,355
Jun-04	24,105	73,208	18,594	6,237	3,784	1,672	741	3,819	132,161
Jul-04	24,387	73,077	19,016	6,484	3,793	1,718	731	4,140	133,344
Aug-04	24,213	69,568	18,269	6,164	3,852	1,685	716	4,000	128,467
Sep-04	24,836	73,530	18,889	6,501	3,829	1,637	754	4,340	134,316
Oct-04	24,331	71,288	18,581	6,387	3,930	1,672	717	4,548	131,455
Nov-04	24,807	71,452	19,712	6,701	3,934	1,701	739	5,023	134,069

Month-over-month growth rates

Nov-03	0.0	1.6	-2.2	-7.2	-2.1	0.9	-6.5	-1.5	0.1
Dec-03	1.8	1.9	9.2	10.7	2.8	7.7	2.2	11.5	3.7
Jan-04	6.1	-1.8	-4.1	-0.5	-3.9	-3.5	-1.2	-6.1	-0.9
Feb-04	-5.2	0.8	0.2	4.6	1.8	-1.8	1.1	7.7	-0.1
Mar-04	-1.2	-0.8	0.9	-7.6	4.5	-3.6	-14.8	-1.6	-1.0
Apr-04	0.6	5.9	-1.5	6.0	-5.0	4.8	28.6	-0.6	3.4
May-04	-0.8	-0.1	1.7	-6.4	0.3	-3.1	-7.9	-7.4	-0.6
Jun-04	2.1	0.5	-1.7	1.5	3.4	3.2	1.3	-0.4	0.6
Jul-04	1.2	-0.2	2.3	4.0	0.2	2.8	-1.4	8.4	0.9
Aug-04	-0.7	-4.8	-3.9	-4.9	1.6	-1.9	-1.9	-3.4	-3.7
Sep-04	2.6	5.7	3.4	5.5	-0.6	-2.8	5.3	8.5	4.6
Oct-04	-2.0	-3.0	-1.6	-1.7	2.7	2.2	-5.0	4.8	-2.1
Nov-04	2.0	0.2	6.1	4.9	0.1	1.7	3.1	10.4	2.0

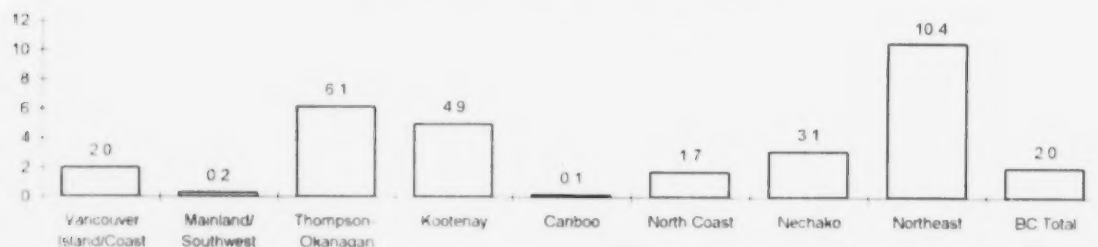
November month-over-month percent growth


Table 2: Room Revenue by Accommodation Type (\$000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			

Annual data

1999	385,951	182,241	274,381	184,163	170,054	74,101	58,456
2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423

Annual growth rates

1999	5.4	15.3	15.3	12.9	2.2	19.2	12.0
2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9

Monthly data

Nov-03	37,252	15,572	25,565	14,637	15,345	9,840	7,545
Dec-03	39,112	15,890	25,509	14,862	16,822	10,778	8,788
Jan-04	36,294	15,792	25,861	15,066	15,727	9,782	8,212
Feb-04	36,672	15,500	25,924	14,759	15,704	10,017	8,019
Mar-04	38,328	16,091	26,065	14,866	15,822	9,431	7,366
Apr-04	39,644	15,668	26,618	15,268	15,634	10,080	7,961
May-04	39,849	16,201	26,724	15,267	15,708	10,373	7,893
Jun-04	39,498	16,550	26,791	15,475	15,987	10,350	8,018
Jul-04	38,257	16,365	27,038	15,685	16,292	10,580	8,408
Aug-04	36,883	16,127	26,003	15,294	15,229	10,480	8,201
Sep-04	39,489	16,933	27,071	15,756	16,091	10,754	8,674
Oct-04	36,487	16,482	27,013	15,880	16,285	10,807	8,341
Nov-04	36,564	17,590	27,789	15,587	17,352	11,056	8,674

Month-over-month growth rates

Nov-03	1.9	0.4	-0.6	0.2	-1.3	2.6	-5.7
Dec-03	5.0	2.0	-0.2	1.5	9.6	9.5	16.5
Jan-04	-7.2	-0.6	1.4	1.4	-6.5	-9.2	-6.6
Feb-04	1.0	-1.9	0.2	-2.0	-0.2	2.4	-2.3
Mar-04	4.5	3.8	0.5	0.7	0.8	-5.8	-8.2
Apr-04	3.4	-2.6	2.1	2.7	-1.2	6.9	8.1
May-04	0.5	3.4	0.4	0.0	0.5	2.9	-0.8
Jun-04	-0.9	2.1	0.2	1.4	1.8	-0.2	1.6
Jul-04	-3.1	-1.1	0.9	1.4	1.9	2.2	4.9
Aug-04	-3.6	-1.4	-3.8	-2.5	-6.5	-0.9	-2.5
Sep-04	7.1	5.0	4.1	3.0	5.7	2.6	5.8
Oct-04	-7.6	-2.7	-0.2	0.8	1.2	0.5	-3.8
Nov-04	0.2	6.7	2.9	-1.8	6.6	2.3	4.0

November month-over-month percent growth

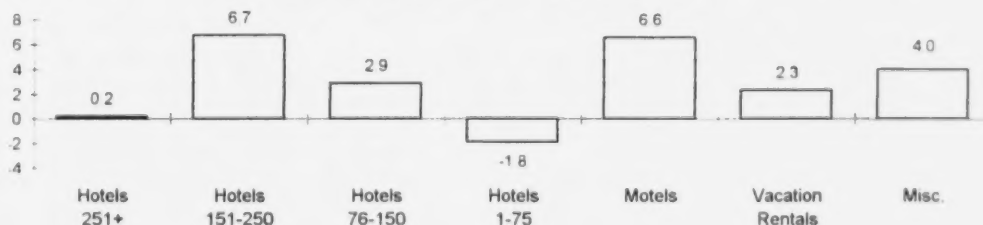


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Oct-04	YTD 04	Oct-03	YTD 03	Oct-04	Oct-03	Oct-04	Oct-03
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	7,411	159,971	3.2	8.1	154	7	8,125	191
Total - Hotels	6,252	130,789	2.0	8.8	66	1	5,547	225
76+ Rooms	4,985	100,449	5.2	10.0	26	1	3,937	236
1-75 Rooms	1,267	30,340	-8.8	4.8	40	0	1,610	-11
Motels	594	13,689	-0.4	1.7	29	-1	1,068	-49
Vacation Rentals	204	4,920	25.0	-3.1	25	4	319	-7
19 Cowichan Valley								
Total - All accommodation types	415	7,918	-8.6	1.8	34	2	647	9
Motels	114	1,807	1.1	6.6	17	1	323	19
21 Nanaimo								
Total - All accommodation types	1,955	36,412	6.0	5.6	65	1	2,521	-164
Total - Hotels	1,216	18,371	17.7	7.5	20	-1	1,244	-208
Motels	415	7,533	21.6	5.9	23	2	623	48
Vacation Rentals	244	8,810	-40.6	3.1	16	0	530	-4
23 Alberni-Clayoquot								
Total - All accommodation types	1,895	37,077	16.6	11.6	53	1	1,347	6
Motels	147	3,838	20.6	3.8	20	0	405	0
Vacation Rentals	723	13,106	41.4	19.9	13	2	319	43
25 Comox-Strathcona								
Total - All accommodation types	1,245	29,018	-2.0	5.5	48	-1	1,395	-142
Motels	381	7,041	-13.0	4.4	22	-1	593	-49
27 Powell River								
Total - All accommodation types	-	-	-	-	16	1	356	2
43 Mount Waddington								
Total - All accommodation types	192	5,223	-4.8	-2.4	17	-1	559	-79
Total - Hotels	118	3,057	-5.7	-3.4	11	-1	453	-79
45 Central Coast								
Total - All accommodation types	-	-	-	-	5	0	89	0
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	2,259	35,968	15.7	7.5	68	3	2,556	16
Total - Hotels	1,748	25,755	27.4	7.2	23	0	1,495	0
Motels	428	7,524	4.2	8.8	35	0	915	0
15 Greater Vancouver								
Total - All accommodation types	36,529	602,989	3.4	10.0	230	-2	25,743	-8
Total - Hotels	34,621	568,272	2.7	10.0	156	-5	22,795	-541
251+ Rooms	18,384	311,601	-0.7	10.2	24	-1	9,678	-278
151-250 Rooms	6,790	107,469	6.5	9.6	25	0	4,752	0
76-150 Rooms	7,103	110,934	6.9	10.1	52	-2	5,621	-225
1-75 Rooms	2,344	38,268	7.2	9.8	55	-2	2,744	-38
Motels	1,099	16,626	23.0	10.2	38	2	1,642	104
Vacation Rentals	454	7,876	5.8	11.5	16	1	555	14
29 Sunshine Coast								
Total - All accommodation types	190	4,078	19.7	10.9	19	2	342	48
31 Squamish-Lillooet								
Total - All accommodation types	4,098	155,632	3.1	-6.1	91	1	7,338	318
Total - Hotels	3,343	126,489	5.3	-4.7	47	2	5,723	293
151+ Rooms	2,104	83,493	18.7	-6.1	11	1	3,429	272
76-150 Rooms	823	32,023	-8.3	-1.6	15	0	1,519	0
1-75 Rooms	416	10,973	-17.4	-2.1	21	1	775	21
Vacation Rentals	451	19,786	2.5	-11.8	25	1	1,196	39
Miscellaneous	217	7,590	-12.9	-14.9	12	-2	250	-14
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	1,505	39,282	38.8	8.3	93	-3	3,009	-3
Total - Hotels	873	19,110	26.6	5.2	15	-2	1,186	-74
Motels	416	16,212	21.7	11.6	61	-4	1,531	-48

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Oct-04	YTD 04	Oct-03	YTD 03	Oct-04	Oct-03	Oct-04	Oct-03
33 Thompson-Nicola								
Total - All accommodation types	2,356	58,986	8.9	12.8	130	2	5,092	19
Total - Hotels	1,328	27,264	25.2	15.9	31	-1	2,133	-11
76+ Rooms	1,102	21,717	28.4	19.4	12	0	1,389	0
1-75 Rooms	226	5,546	11.9	4.0	19	-1	744	-11
Motels	882	18,733	-7.0	13.6	76	1	2,292	8
Miscellaneous	74	4,100	-0.4	4.8	11	1	248	17
35 Central Okanagan								
Total - All accommodation types	2,618	64,605	-4.3	5.1	50	-1	3,032	-32
Total - Hotels	2,048	42,811	-2.4	5.3	19	1	1,710	4
Motels	509	13,163	-14.4	2.0	23	-1	1,083	-35
37 North Okanagan								
Total - All accommodation types	966	17,676	-5.3	-2.7	37	-3	1,534	-79
Total - Hotels	531	9,973	-21.7	-6.5	13	0	790	0
Motels	300	5,798	11.5	19.5	17	-2	568	-74
39 Columbia-Shuswap								
Total - All accommodation types	1,173	36,389	13.0	8.4	79	-3	2,790	-63
Total - Hotels	594	15,907	8.4	9.0	18	0	1,032	-3
Motels	515	13,477	13.2	10.6	42	-3	1,437	-64
Miscellaneous	44	3,884	75.2	5.1	16	0	284	3
Kootenay								
01 East Kootenay								
Total - All accommodation types	1,560	48,632	11.1	6.9	96	6	4,079	-56
Total - Hotels	606	14,972	5.8	1.3	25	2	1,424	-8
Motels	485	10,739	17.9	6.6	39	-4	987	-126
Vacation Rentals	74	10,267	60.9	18.0	14	4	917	128
03 Central Kootenay								
Total - All accommodation types	910	17,525	17.4	7.4	61	1	1,390	46
Total - Hotels	571	9,591	9.4	9.8	17	2	738	30
Motels	268	4,486	34.6	-2.3	29	0	535	6
Vacation Rentals	53	1,447	38.6	16.5	11	0	70	1
05 Kootenay Boundary								
Total - All accommodation types	397	5,821	29.9	9.2	29	-2	618	-19
Motels	236	3,347	19.5	9.7	19	-2	339	-15
Cariboo								
41 Cariboo								
Total - All accommodation types	935	16,610	11.3	3.9	59	-1	1,619	27
Motels	557	8,458	5.9	3.7	34	1	975	-2
53 Fraser-Fort George								
Total - All accommodation types	1,891	26,685	6.1	7.2	48	0	2,414	9
Total - Hotels	1,472	18,615	4.2	5.7	20	1	1,489	82
Motels	416	7,085	12.1	11.6	27	-1	896	-73
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	437	11,696	-2.2	3.0	25	-3	856	-84
Motels	108	2,277	9.9	7.3	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	513	7,770	12.5	8.2	28	0	747	-2
Motels	206	2,768	6.3	1.6	16	2	387	15
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	568	8,336	5.5	-1.6	43	2	1,095	-4
Motels	346	4,666	6.6	-2.8	25	1	669	30
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	4,037	46,685	36.1	9.9	69	5	3,735	914
Total - Hotels	1,961	22,811	34.9	24.7	23	3	1,579	145
Motels	1,259	11,657	43.7	12.7	31	0	877	-15

--- Data for regions with fewer than 10 properties reporting can not be released.

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Oct-04	YTD 04	Oct-03	YTD 03	Oct-04	Oct-03	Oct-04	Oct-03
Vancouver Island/Coast	13,378	281,739	4.9	7.9	392	10	15,039	-177
Victoria (C)	5,990	126,809	2.2	8.3	75	4	5,612	281
Other CRD	1,420	33,162	7.3	7.3	79	3	2,513	-90
Nanaimo (C)	1,400	18,830	22.0	8.5	22	1	1,216	20
Port Alberni (C)	223	3,654	20.7	10.6	11	-1	309	-26
Courtenay (C)	-	-	-	-	9	0	398	-20
Rest of Development Region	-	-	-	-	205	3	4,991	-342
Mainland/Southwest	43,076	798,667	4.0	6.3	408	4	35,979	374
Downtown Vancouver (C)	21,644	388,393	-0.3	10.6	83	-2	12,676	-277
Other Vancouver (C)	1,784	30,530	3.9	5.0	32	-3	2,656	-73
Richmond (C)	6,802	92,123	13.4	10.0	24	1	4,371	50
Burnaby (C)	1,759	25,306	0.4	8.6	11	0	1,357	314
Other GVRD	4,540	66,637	9.0	9.2	80	2	4,683	150
Whistler (DM)	3,811	149,456	5.3	-6.2	69	1	6,783	318
Rest of Development Region	2,737	46,222	10.9	6.2	109	5	3,453	-108
Thompson/Okanagan	8,816	216,918	7.2	7.5	389	-8	15,465	-198
Penticton (C)	1,029	23,250	46.0	9.7	40	-2	1,757	-58
Kamloops (C)	1,792	44,562	12.4	16.1	62	3	3,546	109
Kelowna (C)	2,430	57,471	-5.1	4.7	41	-1	2,601	-28
Vernon (C)	944	18,343	-5.6	-3.4	31	-1	1,428	-66
Revelstoke (C)	455	13,517	15.3	7.0	25	-1	1,017	-26
Rest of Development Region	1,967	61,775	10.1	6.9	190	-6	5,116	-89
Kootenay	2,866	71,979	15.4	7.2	186	5	6,087	-29
Cranbrook (C)	505	7,605	4.5	0.8	17	-1	787	-28
Nelson (C)	300	6,060	13.6	5.1	11	0	419	-34
Rest of Development Region	2,061	58,314	18.7	8.3	169	6	5,300	-1
Cariboo	2,827	43,295	7.8	5.9	107	-1	4,033	36
Quesnel (C)	202	3,298	-12.4	0.2	12	0	427	0
Williams Lake (C)	337	4,605	20.0	6.8	10	-1	502	-32
Prince George (C)	1,560	19,783	3.8	5.1	27	0	1,697	9
Rest of Development Region	728	15,609	19.6	8.1	58	0	1,407	59
North Coast	950	19,466	5.2	5.0	53	-3	1,603	-86
Prince Rupert (C)	342	6,792	-4.3	3.6	14	-1	718	-43
Terrace (C)	319	4,419	-	-	11	2	403	40
Rest of Development Region	289	8,256	-	-	28	-4	482	-83
Nechako	568	8,336	5.5	-1.6	43	2	1,095	-4
Smithers (T)	290	4,055	14.5	3.2	14	0	414	0
Rest of Development Region	278	4,280	-2.5	-5.8	29	2	681	267
Northeast	4,037	48,685	36.1	9.9	69	5	3,735	914
Dawson Creek (C)	650	6,314	26.9	17.5	13	-1	486	-9
Fort St. John (C)	1,804	18,875	27.3	18.6	20	1	1,716	93
Rest of Development Region	1,782	21,496	49.2	1.5	36	5	1,533	830

†† Data for regions with fewer than 10 properties reporting can not be released

Table 5: Historical Unadjusted Room Revenue by Development Region (\$000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
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Annual data

1999	238,389	778,153	166,895	53,603	40,788	18,651	8,684	24,183	1,329,347
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681

Annual growth rates

1999	8.5	13.3	7.1	13.5	-3.8	4.1	-2.8	-11.0	10.2
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3

Monthly data

Nov-03	12,753	41,418	8,039	2,484	2,622	903	538	2,967	71,724
Dec-03	11,763	59,336	11,652	5,024	2,199	831	454	3,803	95,060
Jan-04	10,891	59,523	12,523	5,875	2,276	791	415	4,428	96,722
Feb-04	14,125	68,452	15,086	8,185	2,450	1,033	459	6,323	116,112
Mar-04	17,288	74,357	15,792	7,768	3,224	1,040	507	6,565	126,540
Apr-04	19,495	63,507	12,696	5,004	3,223	1,056	545	3,660	109,186
May-04	25,608	71,530	18,051	4,761	3,831	1,504	652	2,397	128,335
Jun-04	31,380	81,609	21,957	5,917	4,691	2,786	983	3,231	152,554
Jul-04	44,238	98,094	37,572	9,647	5,469	3,434	1,051	3,896	203,401
Aug-04	49,331	101,639	37,084	10,120	6,099	3,253	1,098	4,029	212,652
Sep-04	35,090	81,870	23,588	7,535	5,209	2,367	1,171	4,075	160,906
Oct-04	20,916	55,010	13,954	4,301	3,996	1,251	886	4,044	104,357
Nov-04	13,378	43,076	8,616	2,866	2,827	950	568	4,037	76,318

Year-over-year percent changes

Nov-03	7.1	-0.9	7.6	0.0	-0.5	4.4	-8.1	18.7	2.1
Dec-03	4.6	0.0	12.7	13.6	6.6	27.1	3.0	70.9	4.8
Jan-04	13.9	-4.4	3.3	8.0	1.1	8.0	-6.0	10.5	-0.1
Feb-04	9.7	-5.5	11.6	12.1	8.4	6.9	-14.0	24.7	1.0
Mar-04	3.8	1.4	7.0	0.3	7.8	-7.2	-15.9	-4.2	2.0
Apr-04	5.9	14.1	6.7	15.2	1.0	5.0	7.0	4.8	10.8
May-04	4.7	11.6	10.5	1.7	1.3	4.3	-2.1	-2.2	8.8
Jun-04	9.0	17.0	2.6	5.0	4.6	6.8	5.9	12.0	11.8
Jul-04	12.4	13.9	14.3	11.6	5.8	10.7	-0.7	3.6	12.9
Aug-04	5.0	0.4	0.2	1.5	9.5	4.7	-3.8	1.3	1.8
Sep-04	11.5	12.8	17.8	13.1	9.1	1.2	7.3	15.2	13.0
Oct-04	5.1	5.2	1.1	1.3	5.9	3.7	-8.0	17.1	4.8
Nov-04	4.9	4.0	7.2	15.4	7.8	5.2	5.5	36.1	6.4

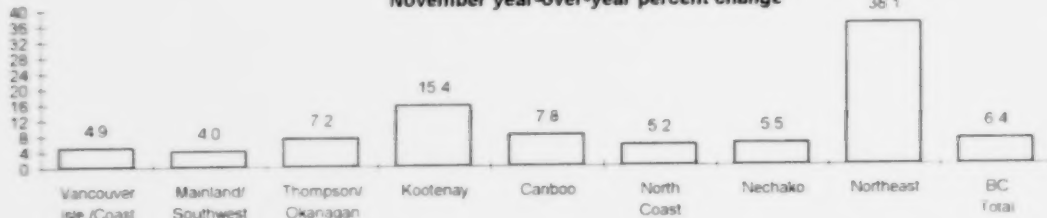
November year-over-year percent change


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**

Annual data

1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,970.8	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.8	118.0
2003	7,335.3	6,137.4	2,580.7	3,556.7	1,197.8	577.6	410.1	124.8
2004	7,406.4	6,019.8	2,480.1	3,559.0	1,386.6	715.8	458.1	144.3

Annual percent changes

1999	5.4	4.8	7.9	2.0	8.6	9.7	7.8	6.6
2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.1	-4.3	-13.8	4.2	-3.0	4.4	-11.7	-10.5
2003	-8.0	-7.0	-8.1	-6.1	-12.9	-24.4	-0.4	5.8
2004	1.0	-1.9	-3.9	0.1	15.8	23.9	11.7	15.6

Monthly data

Dec-03	612.8	504.7	210.7	294.0	108.1	56.2	34.8	11.2
Jan-04	594.5	485.0	205.2	286.4	109.5	57.2	34.9	11.9
Feb-04	600.5	489.7	207.6	287.7	110.8	57.2	36.2	11.0
Mar-04	611.0	504.8	211.5	299.6	106.2	59.0	36.2	9.3
Apr-04	625.6	509.3	211.6	301.4	116.3	63.6	36.9	11.8
May-04	627.2	503.6	206.9	300.3	123.6	65.2	39.3	13.1
Jun-04	635.1	510.6	212.6	298.6	124.5	68.5	39.6	12.9
Jul-04	629.6	509.0	212.1	297.6	120.6	59.2	42.0	12.8
Aug-04	608.9	493.5	203.8	294.0	115.5	58.6	38.8	12.7
Sep-04	647.3	529.4	205.5	304.8	117.9	58.0	40.5	12.7
Oct-04	610.0	493.2	203.1	295.1	116.8	58.4	39.6	11.8
Nov-04	607.3	496.1	201.7	299.2	111.2	56.0	35.5	12.1
Dec-04	609.4	495.8	198.5	294.4	113.6	55.0	38.7	12.2

Month-over-month growth rates

Dec-03	0.6	0.2	-0.3	1.6	2.4	2.1	-2.0	8.7
Jan-04	-3.0	-3.9	-2.6	-2.6	1.2	1.8	0.4	5.7
Feb-04	1.0	1.0	1.2	0.5	1.2	0.0	3.6	-7.2
Mar-04	1.8	3.1	1.9	4.1	-4.1	3.1	0.1	-15.5
Apr-04	2.4	0.9	0.0	0.6	9.5	7.8	1.9	26.3
May-04	0.3	-1.1	-2.2	-0.4	6.3	2.5	6.6	11.6
Jun-04	1.3	1.4	2.7	-0.6	0.7	5.2	0.6	-1.8
Jul-04	-0.9	-0.3	-0.2	-0.3	-3.1	-13.6	6.2	-0.3
Aug-04	-3.3	-3.0	-3.9	-1.2	-4.3	-1.1	-7.6	-1.4
Sep-04	6.3	7.3	0.8	3.7	2.1	-1.1	4.3	0.4
Oct-04	-5.8	-6.8	-1.2	-3.2	-0.9	0.7	-2.3	-7.6
Nov-04	-0.4	0.6	-0.7	1.4	-4.8	-4.0	-10.2	3.2
Dec-04	0.3	-0.1	-1.6	-1.6	2.2	-1.9	8.8	0.7

* Seasonal adjustment of total US entries are calculated by Statistics Canada and are adjusted to sum to national totals, therefore same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)				Other Transportation (000s)			
	Vancouver			Victoria	BC Ferries		Coquihalla Hwy Passenger Vehicles	
	Total	Domestic	Trans-border		Other Int'l.	Total		Vehicles

Annual data

1999	15,807	8,314	4,120	3,373	1,191	7,852	21,369	2,388
2000	16,033	8,306	4,074	3,652	1,139	7,887	21,280	2,400
2001	15,477	7,869	4,001	3,608	1,158	8,104	21,309	2,461
2002	14,877	7,422	3,855	3,600	1,102	8,272	21,540	2,530
2003	14,321	7,267	3,814	3,241	1,183	8,263	21,348	2,480

Annual growth rates

1999	1.9	1.2	-0.1	6.4	-1.9	0.4	-0.2	0.5
2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.7	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.9	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0

Monthly data

Dec-03	1,263	640	322	301	105	638	1,650	210
Jan-04	1,253	633	319	301	104	679	1,754	197
Feb-04	1,272	650	326	296	106	710	1,818	214
Mar-04	1,277	650	327	300	102	715	1,839	223
Apr-04	1,304	653	338	314	104	715	1,864	221
May-04	1,321	663	329	330	103	702	1,821	216
Jun-04	1,324	670	322	332	103	703	1,811	214
Jul-04	1,315	673	318	324	104	706	1,821	219
Aug-04	1,300	657	325	318	100	697	1,776	209
Sep-04	1,340	686	335	320	109	711	1,834	222
Oct-04	1,321	676	330	314	104	717	1,852	215
Nov-04	1,329	682	333	315	104	729	1,870	221
Dec-04	1,342	693	336	313	107	750	1,893	216

Month-over-month growth rates

Dec-03	0.3	1.0	-1.0	0.0	1.0	-7.1	-6.4	6.8
Jan-04	-0.8	-1.2	-0.8	0.0	-1.0	6.5	6.3	-6.0
Feb-04	1.5	2.8	2.0	-1.6	1.4	4.6	3.7	8.3
Mar-04	0.4	-0.1	0.3	1.6	-3.3	0.6	1.1	4.2
Apr-04	2.2	0.5	3.4	4.4	2.4	0.0	1.4	-0.7
May-04	1.3	1.4	-2.5	5.1	-1.7	-1.9	-2.3	-2.4
Jun-04	0.2	1.1	-2.2	0.8	0.7	0.2	-0.6	-1.0
Jul-04	-0.7	0.4	-1.2	-2.5	0.8	0.5	0.6	2.3
Aug-04	-1.1	-2.4	2.4	-2.0	-3.7	-1.4	-2.5	-4.6
Sep-04	3.1	4.4	2.8	0.7	9.1	2.1	3.3	6.5
Oct-04	-1.5	-1.4	-1.3	-1.8	-5.3	0.8	1.0	-3.4
Nov-04	0.7	0.8	0.8	0.2	0.9	1.7	1.0	3.1
Dec-04	1.0	1.7	1.0	-0.7	2.2	2.9	1.3	-2.2

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel Industry ²		Consumer Price Index ¹	
	Total tourism related	Air transport ⁴	Accommodation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%) ³	Room Rate (\$)	Traveller accommodation	Restaurant food ⁴

Annual data

1999	181.7	15.3	29.2	110.1	27.1	61.7	112.03	133.1	115.6
2000	188.4	14.8	28.2	116.7	28.8	60.0	114.04	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.13	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	117.00	124.1	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	113.73	111.8	127.6

Annual Growth Rates

1999	-1.5	-3.6	-0.5	0.4	-8.5	-0.2	3.1	2.4	1.5
2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.6	0.7	-6.9	3.3
2003	1.1	4.4	-0.7	-0.3	6.8	-1.1	-2.8	-9.9	1.8

Monthly data

Dec-03	193.3	12.3	28.2	119.6	33.2	60.2	114.20	106.0	128.5
Jan-04	194.7	12.8	27.6	120.6	33.8	60.3	114.00	104.0	128.8
Feb-04	193.6	13.0	27.5	119.7	33.5	59.3	113.40	102.9	128.9
Mar-04	193.7	12.7	27.5	118.3	35.2	61.2	113.50	103.1	129.1
Apr-04	192.3	12.7	27.7	117.5	34.4	62.1	115.90	102.9	129.6
May-04	192.9	12.8	28.4	117.2	34.4	62.0	115.80	102.7	129.8
Jun-04	192.6	13.2	27.6	117.6	34.2	62.6	115.70	102.5	129.8
Jul-04	192.1	13.0	27.6	117.0	34.5	61.8	116.10	102.0	129.9
Aug-04	193.6	13.2	27.3	117.5	35.6	59.7	116.00	100.8	129.7
Sep-04	193.5	13.2	27.6	116.9	35.8	62.4	116.80	101.7	130.0
Oct-04	190.6	13.3	27.4	115.4	34.4	62.1	116.10	101.6	130.4
Nov-04	193.5	13.2	27.2	117.5	35.7	62.9	117.30	102.8	130.6
Dec-04	194.9	13.1	27.4	118.0	36.3	63.7	117.60	103.0	131.9

Month-over-month growth rates

Dec-03	0.1	-2.9	-0.7	0.8	-0.5	-0.3	0.0	-1.3	-0.2
Jan-04	0.8	4.1	-2.0	0.8	1.8	0.1	-0.2	-1.9	0.2
Feb-04	-0.6	1.5	-0.3	-0.7	-1.0	-1.0	-0.5	-1.1	0.1
Mar-04	0.0	-1.7	-0.1	-1.2	5.1	1.9	0.1	0.2	0.2
Apr-04	-0.7	-0.2	0.6	-0.7	-2.0	0.9	2.1	-0.2	0.4
May-04	0.3	0.6	2.8	-0.2	-0.2	-0.1	-0.1	-0.2	0.2
Jun-04	-0.1	3.1	-3.1	0.3	-0.6	0.6	-0.1	-0.2	0.0
Jul-04	-0.2	-1.5	0.3	-0.6	1.0	-0.8	0.3	-0.5	0.1
Aug-04	0.7	1.5	-1.1	0.4	3.0	-2.1	-0.1	-1.2	-0.2
Sep-04	0.0	0.3	0.9	-0.5	0.5	2.7	0.7	0.9	0.2
Oct-04	-1.5	0.8	-0.8	-1.3	-3.7	-0.3	-0.6	-0.1	0.3
Nov-04	1.6	-0.8	-0.7	1.8	3.5	0.8	1.0	1.2	0.2
Dec-04	0.7	-0.8	1.0	0.4	1.9	0.8	0.3	0.2	1.0

¹Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats²Source: Pannell Kerr Forster and BC Stats³Occupancy Rate change expressed as percentage point change⁴No identifiable seasonality.

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns ¹					
	Receipts (\$ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services

Annual data

1999	4,467.5	369.8	4,097.8	28,143.9	2,038.3	26,105.6
2000	4,831.5	358.9	4,472.6	30,244.5	2,210.4	28,034.1
2001	5,176.3	357.9	4,818.4	32,231.1	2,280.9	29,950.2
2002	5,101.2	305.9	4,795.3	33,134.7	2,241.2	30,893.5
2003	5,388.8	284.4	5,104.3	33,648.9	2,089.1	31,559.8

Annual growth rates

1999	-3.7	-7.3	-3.4	4.3	12.9	3.6
2000	8.1	-2.9	9.1	7.5	8.4	7.4
2001	7.1	-0.3	7.7	6.6	3.2	6.8
2002	-1.5	-14.6	-0.5	2.8	-1.7	3.1
2003	5.6	-7.0	6.4	1.6	-6.8	2.2

Monthly data

Apr-03	427	24	403	2,722	178	2,544
May-03	430	24	406	2,774	173	2,602
Jun-03	430	24	406	2,778	175	2,603
Jul-03	451	24	427	2,794	181	2,612
Aug-03	460	24	436	2,820	174	2,646
Sep-03	464	23	441	2,828	168	2,660
Oct-03	470	22	448	2,866	168	2,698
Nov-03	477	23	454	2,887	169	2,717
Dec-03	478	24	454	2,882	167	2,715
Jan-04	479	22	456	2,869	158	2,711
Feb-04	485	23	463	2,923	166	2,757
Mar-04	498	23	475	2,941	169	2,771
Apr-04	518	24	494	2,949	167	2,781

Month-over-month growth rates

Apr-03	-0.5	3.8	-0.8	-1.5	0.6	-1.6
May-03	0.6	-3.0	0.8	1.9	-3.1	2.3
Jun-03	0.1	1.4	0.0	0.1	1.3	0.0
Jul-03	5.0	1.3	5.2	0.6	3.5	0.4
Aug-03	2.0	-1.1	2.2	0.9	-3.9	1.3
Sep-03	0.7	-6.1	1.1	0.3	-3.6	0.5
Oct-03	1.4	-1.8	1.5	1.4	0.3	1.4
Nov-03	1.5	2.3	1.4	0.7	0.5	0.7
Dec-03	0.2	4.7	-0.1	-0.2	-1.4	-0.1
Jan-04	0.2	-5.5	0.5	-0.5	-5.4	-0.2
Feb-04	1.4	1.2	1.4	1.9	5.3	1.7
Mar-04	2.5	1.3	2.6	0.6	1.9	0.5
Apr-04	4.1	5.9	4.0	0.3	-1.3	0.4

¹Source: Statistics Canada & BC Stats.

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Tourism Sector Monitor ♦ March 2005

Room Revenue

Room revenues rose in **December** (+2.2% *seasonally adjusted*), for the second consecutive month. Vancouver Island/Coast (+2.8%), Mainland Southwest (+2.8%) and Cariboo (+19.2%) were the regions with increased room revenues in December. Three out of eight development regions in BC saw room revenues decline, with particularly large downturns recorded in North Coast (-12.0%) and Northeast (-6.1%).



Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type			
	Dec 04 (\$000)	Nov 04 (\$000)	% change
Total	138,797	135,856	+2.2
Hotels	102,926	99,093	+3.9
Motels	17,228	17,620	-2.2
Other Acc.	19,809	19,908	-0.5
Regions (Top 3 performers)			
Cariboo	4,719	3,957	+19.2
Mainland/Southwest	74,532	72,512	+2.8
Vancouver Island/Coast	25,879	25,177	+2.8

Driving the growth was revenues at very large hotels (251+ rooms, +12.4%). However, the other establishment types, with the exception of vacation rentals (+1.0%), recorded lower revenues in December.

Room revenues increased in the **fourth quarter** (+2.4%, *seasonally adjusted*) after experiencing virtually no change in the third quarter. Revenues were up in all development regions with the exception of North Coast (-3.3%). Vancouver Island/Coast (+2.1%), Thompson/Okanagan (+3.7%), Cariboo (+10.4%) and Northeast (+23.9%) recorded solid performances in the last quarter of 2004. Revenues edged up in Mainland/Southwest (+0.7%) and Nechako (+0.4%).

Hotels of all sizes were busier in the fourth quarter. Large (151-250 rooms, +3.7%) and medium (76-150 rooms, +2.3%) size hotels posted solid growth. However, revenues at motels (+6.7%) and vacation rentals (+7.7%) posted the greatest gains.

Visitor Entries

The number of visitors entering Canada via BC border crossings edged up in **December** (+0.3% *seasonally adjusted*), largely due to an increase in visits from overseas (+2.2%). Entries from the US were flat (-0.1%), with a decrease in the number of same-day cross border excursions (-2.0%) and a drop in overnight visits (-1.9%).

European entries recovered in December (+9.2%) due to an increase in travellers from Germany (+8.9%) and the UK (+4.3%). The overall drop of 2.1% in the number of Asian visitors was due to substantially fewer visi-

tors from Japan (-5.4%), Hong Kong (-11.3%) and Taiwan (-3.3%).

The number of visitors from Australia, New Zealand and the South Pacific edged up 0.7%.

Visitor entries edge up

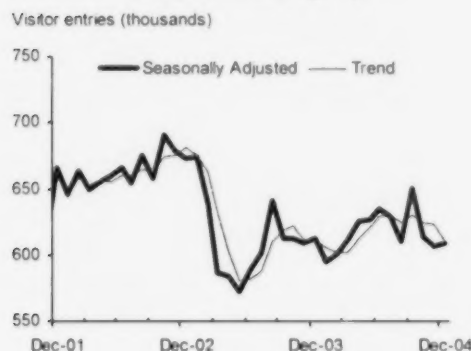


Table 2. Traveller Entries
(seasonally adjusted)

	Dec-04 (⁰⁰⁰)	Nov-04 (⁰⁰⁰)	% chg from Nov-04
American visitors			
Total	496	496	-0.1
Same-day	195	199	-2.0
Overnight	292	297	-1.9
Overseas visitors			
Total	114	111	2.2
Europe	39	36	9.2
UK	18	18	4.3
Asia	55	56	-2.1
Japan	18	19	-5.4
Taiwan	6	6	-3.3
Oceania	12	12	0.7

Note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Canadian travel abroad increased (+3.6%) because Canadians took more trips to the US (+5.6%). Travel to other destinations edged down (-0.5%).

The volume of travellers entering Canada via BC decreased (-3.2%) in the **fourth quarter**, as fewer visitors entered BC from the US (-3.1%) and overseas (-3.5%). The Euro-

pean entries were down 5.6%, as were entries from Australian, New Zealand and the South Pacific markets (-5.6%), and the Asian market (-2.6%). The US same day (-4.0%) and overnight (-1.2%) traffic also slumped in the fourth quarter.

Other Indicators

In the hotel industry, both average room rates (+0.3%) and hotel occupancy (+0.8 percentage points) edged up December.

Employment in key tourism-related industries increased (+0.7%) in December. The arts, entertainment & recreation (+1.9%) and the accommodation (+1.0%) industries increased employment moderately, while the air transport sector (-0.8%) saw modest job losses.

The Consumer Price Index for traveller accommodation (+0.3%), and the cost of restaurant food (+0.9%) edged up marginally in December.

Transportation indicators were mixed in December. The number of passengers at the Vancouver airport crept up (+0.4%), mostly due to domestic traffic (+1.6%). Traffic at the Victoria airport increased 2.3%. There was solid growth in the number of vehicles (+3.2%) and passengers (+1.9%) aboard BC Ferries in December.

On the Coquihalla Highway, 2.4% fewer passenger vehicles passed through the toll-booths in December.

In the **fourth quarter** hotel occupancy increased (+1.6 percentage points) to 62.9%, while room rates edged up (+0.6%) from the third quarter to \$117.

Air passenger traffic at the Vancouver airport rose to over 4 million travellers, 1.1% more than in the third quarter. Traffic at the Victoria airport (+0.4%) edged up to 315 thousand visitors.

BC Ferries were busier in the fourth quarter, carrying more passengers (+3.4%) and vehicles (+3.6%). Traffic on the Coquihalla Highway, the main route connecting the southwest part of the province with the rest of BC, edged up (+0.3%) in the fourth quarter.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Change from	
	Dec-04	Nov-04
Hotel Industry		
Occupancy rate	63.7	0.8 pp.
Average room charge (Pannell Kerr Forster)	117.60	0.3%
Airport Passengers (000s) (%)		
Vancouver International Airport		
Total traffic	1,347	0.4
US (trans-border)	338	-0.8
Other International	313	-0.6
Canada (domestic) (YVR)	696	1.6
Victoria International Airport		
Total traffic (Victoria Airport Authority)	107	2.3
Transportation (000s) (%)		
Coquihalla Highway		
Passenger Vehicles (Ministry of Transportation & Highways)	215	-2.4
BC Ferries		
Vehicle Volume	748	3.2
Passenger Volume (BC Ferries)	1,899	1.9
Exchange Rates Cdn \$		
US \$	0.820	-0.02
UK Pound	0.426	-0.02
Japanese Yen	85.222	-2.24
Australian \$ (Statistics Canada)	1.071	-0.01

Note: pp. percentage points

Note to readers: all data in the *Tourism Sector Monitor* are reported on a seasonally adjusted basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues decreased (-2.3%, *seasonally adjusted*) in January as all but two regions posted month-over-month declines. Revenues were down in the two largest development regions Mainland/ Southwest (-3.0%) and Vancouver Island/Coast (-1.0%). The only two regions to escape the downturn were Northeast (+7.3%) and Nechako (+6.5%). All accommodation types,

except vacation rentals (+0.2%) experienced substantial losses in January.

Visitor entries took a downturn in January (-4.7%, *seasonally adjusted*). This was largely due to a significant drop in visitors from the US (-5.6%).

Transportation indicators were down in January with the exception of the Vancouver (+1.5%) and Victoria (+0.9%) airports. There were substantially fewer passengers (-9.4%) and vehicles (-9.0%) aboard BC Ferries.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

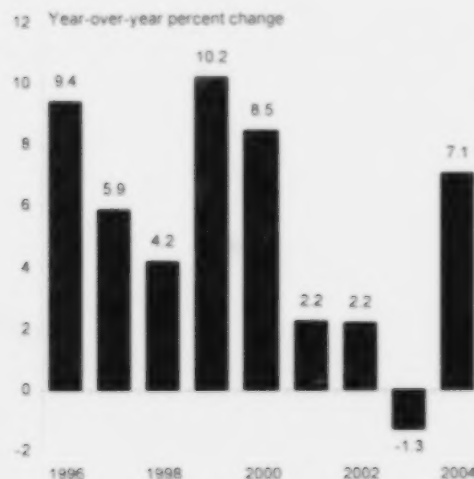
Special Focus: BC's tourism sector in 2004

BC's tourism sector rebounded in 2004 with most indicators showing solid growth. Room revenues, visitor entries, passenger traffic, and other indicators recovered most of the ground lost in 2003, when various external factors plagued the tourism industry.

Revenues posted strong growth in 2004

Room revenues at hotels, motels and other establishments in British Columbia increased 7.1% to reach close to \$1.6 billion in 2004. Although this was below the rates at which revenues had been expanding at the turn of the twenty first century, the rebound highlights the strength of BC's tourism economy.

Strong growth in room revenues in BC



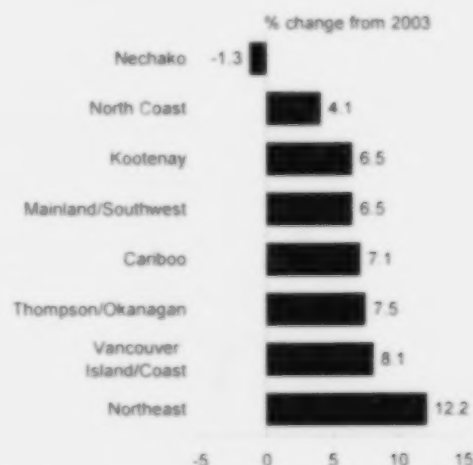
Data Source: BC Stats

Northeast was the top performer in 2004

For the second consecutive year, the Northeast region outperformed the rest of the

province in 2004, posting a growth rate of 12.2%. This follows a gain of 22.1% in 2003. Among regions, only Nechako (-1.3%) had less revenue in 2004 than in the previous year. The two most populated regions, Mainland/Southwest (+6.5%) and Vancouver Island/Coast (+8.1%) made significant gains in room revenues. Thompson-Okanagan (+7.5%) was also a major engine of revenue growth, as were Kootenay (+6.5%), Cariboo (+7.1%) and North Coast (+4.1%).

Revenues up in all regions except Nechako



Data Source: BC Stats

Revenues up at all types of establishments

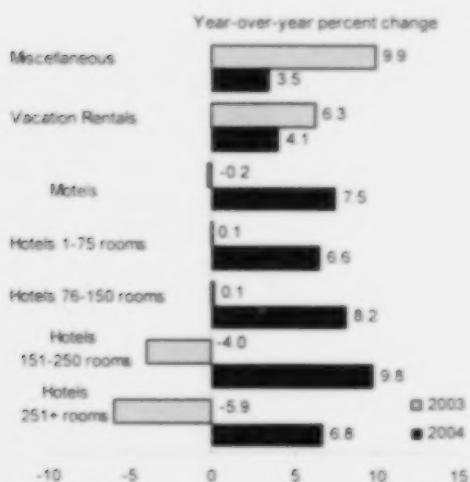
In 2004, hotels and motels outperformed vacation rentals and other types of accommodation properties (including bed and breakfast, fishing lodges and other types of short-term accommodation).

This is a reversal from 2003, when vacation rentals (+6.3%) and other miscellaneous accommodations (+9.9%) were the only

establishments to post significant increases in revenues, proving themselves as important competitors to standard establishments. In 2004, vacation rentals saw a 4.1% increase, while accommodation properties, which include fishing lodges, bed and breakfasts and others, climbed 3.5%.

Top performers in 2004 were large to mid-sized hotels (76-250 rooms) generating almost 33% of the total revenue. Hotels with 151-250 rooms posted the highest gain (+9.8%), followed by mid-size hotels (76-150 rooms, +8.2%). Very large hotels (251+ rooms), which generated almost 30% of total revenue, posted a 6.8% gain.

Large hotels rebounded after slumping in 2003



Data Source: BC Stats

Visitor Entries rose for the first time since 2000

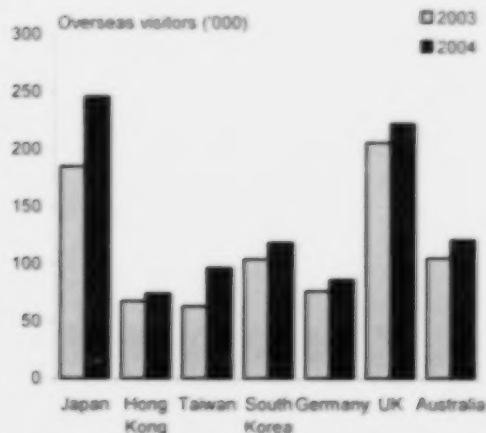
After dropping (-8.0%) in 2003, the number of travellers entering Canada via BC borders rose (+1.1%), increasing to over 7.4 million visitors in 2004. This was the first year-over-year increase since 2000.

Although entries have been recovering from a three year long downturn it has been a slow climb up largely due to a drop in entries from the US (-1.8%) in 2004. US entries play a major role in the overall trend for BC because they make up over 80% of all travellers to the province. Over the last four years, the number of US same-day visits to Canada through BC border crossings has been declining, partly due to increased border security delays since September 2001 and more recently a stronger Canadian currency. Last year was no exception, as the number of same-day visitors dropped (-3.4%) to less than 2.5 million. The number of US visitors on overnight trips who enter Canada via British Columbia grew steadily until 2002. However it has declined during the last two years. In 2004, overnight travel from the US edged down (-0.3%) to 3.5 million visitors.

Overseas travel to BC recovered

There was substantially more travel to BC (+15.9%) from most overseas markets in 2004. Visits from Asia (+23.9%), Australia, New Zealand and the South Pacific (+15.6%) and Europe (+11.7%) increased significantly.

BC's top 7 overseas markets posted gains



Data Source: Statistics Canada

In 2004, total travel to BC from all of the major overseas markets increased. Visitors from Taiwan (+52.5%) and Japan (+33.0%) led the way last year followed by Australia (+14.6%), South Korea (+13.7%) and Germany (+13.0%). The number of visitors from Hong Kong (+9.3%) and the UK (+8.1%) also went up.

More Canadians returning home from overseas travels

The number of Canadians re-entering the country via BC increased (+8.0%) in 2004 for the second year in a row. Travel to overseas countries has had a very positive trend over the past decade, with the exception of 1999. Each year has seen more overseas returns, with the number of visitors rising 10.9% to over one million travellers in 2004.

Same-day car trips from Canada to the US had declined during most of the last decade, but the trend began to change in 2003, when same-day travel increased (+4.4%). In 2004 same-day cross-border excursions rose 7.7%, as Canadian shoppers and tourists took advantage of a strong dollar for the first time since 1993.

Other Annual Indicators

In the hotel industry, the occupancy rate increased by 3.4 percentage points to nearly 62%, while average room prices rose 1.7% in 2004, to \$115.7. The peak occupancy occurred in December (about 64%, *seasonally adjusted*).

Not surprisingly, considering the upturn in visitor entries, air passenger traffic at Vancouver airport rose to over 15.7 million travellers, 9.8% higher than in 2003, with higher volumes on all types of flights. US trans-border (+3.9%), other international travel (+16.5%) and domestic traffic (+9.9%) all increased. Victoria airport welcomed 1.2 million travellers, a 5.7% increase from 2003.

There was a substantial rebound for other transportation indicators in the province in 2004. BC Ferries were busier, carrying more passengers (+2.8%) and vehicles (+3.3%). On the Coquihalla Highway, 4.3% more passenger vehicles passed through the toll-booths last year.

Employment in key tourism-related industries edged up (+0.2%) last year, led by increases in the air transport (+2.2%) and the arts, entertainment and recreation (+4.2%) industry, but offset by decreases in the accommodation sector (-4.8%). The food and beverage industry (0.0%) saw virtually no change.

Other Tourism Indicators (annual)

	2004	Change from 2003
Hotel Industry		
Occupancy rate	61.7	3.4 pp
Average room charge	115.68	1.70%
<i>(Pannell Kerr Forster)</i>		
Airport Passengers	(000s)	(%)
Vancouver International Airport		
Total traffic	15,725	9.8
US (trans-border)	3,964	3.9
Other International	3,775	16.5
Canada (domestic)	7,986	9.9
<i>(YVR)</i>		
Victoria International Airport		
Total traffic	1,250	5.7
<i>(Victoria Airport Authority)</i>		
Transportation	(000s)	(%)
Coquihalla Highway		
Passenger Vehicles	2,586	4.3
<i>(Ministry of Transportation & Highways)</i>		
BC Ferries		
Vehicle Volume	8,532	3.3
Passenger Volume	21,953	2.8
<i>(BC Ferries)</i>		

Note pp. percentage points

In BC, restaurant and tavern receipts increased (+7.7%) in 2004 to over \$5.8 million.

The overall indication is that 2004 was a good year for the tourism sector in BC.

Table 1: Room Revenue by Development Region (\$000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,466,681
2004	295,225	863,192	229,418	76,882	46,130	20,160	8,811	51,889	1,591,707

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.1	6.5	7.5	6.5	7.1	4.1	-1.3	12.2	7.1

Monthly data

Dec-03	23,520	69,391	19,091	6,613	3,724	1,814	722	4,715	129,591
Jan-04	25,509	68,967	18,884	6,434	3,602	1,724	720	3,791	129,631
Feb-04	24,008	69,530	18,866	6,683	3,671	1,677	729	4,249	129,412
Mar-04	23,784	68,819	19,081	6,219	3,825	1,606	622	4,215	128,171
Apr-04	23,914	73,002	18,787	6,597	3,632	1,704	799	3,964	132,399
May-04	23,800	72,992	19,163	6,179	3,640	1,648	737	3,716	131,876
Jun-04	24,294	73,331	18,878	6,268	3,761	1,703	747	3,969	132,950
Jul-04	24,588	73,417	19,286	6,508	3,769	1,750	737	4,081	134,137
Aug-04	24,505	69,904	18,347	6,186	3,829	1,717	725	4,050	129,262
Sep-04	25,104	74,139	19,187	6,454	3,809	1,667	761	4,370	135,491
Oct-04	24,665	72,046	19,030	6,376	3,916	1,700	726	5,263	133,723
Nov-04	25,177	72,512	19,865	6,587	3,957	1,736	750	5,271	135,856
Dec-04	25,879	74,532	20,045	6,391	4,719	1,527	757	4,949	138,797

Month-over-month growth rates

Dec-03	0.0	0.4	5.9	16.2	1.8	12.3	1.3	27.0	2.8
Jan-04	8.5	-0.6	-1.1	-2.7	-3.3	-5.0	-0.3	-19.6	0.0
Feb-04	-5.9	0.8	-0.1	3.9	1.9	-2.7	1.2	12.1	-0.2
Mar-04	-0.9	-1.0	1.1	-6.9	4.2	-4.2	-14.6	-0.8	-1.0
Apr-04	0.5	6.1	-1.5	6.1	-5.0	6.1	28.4	-6.0	3.3
May-04	-0.5	0.0	2.0	-6.3	0.2	-3.3	-7.7	-6.2	-0.4
Jun-04	2.1	0.5	-1.5	1.4	3.3	3.3	1.4	6.8	0.8
Jul-04	1.2	0.1	2.2	3.8	0.2	2.8	-1.4	2.8	0.9
Aug-04	-0.3	-4.8	-4.9	-4.9	1.6	-1.9	-1.6	-0.8	-3.6
Sep-04	2.4	6.1	4.6	4.3	-0.5	-2.9	5.0	7.9	4.8
Oct-04	-1.8	-2.8	-0.8	-1.2	2.8	2.0	-4.6	20.4	-1.3
Nov-04	2.1	0.6	4.4	3.3	1.1	2.1	3.3	0.2	1.6
Dec-04	2.8	2.8	0.9	-3.0	19.2	-12.0	0.8	-6.1	2.2

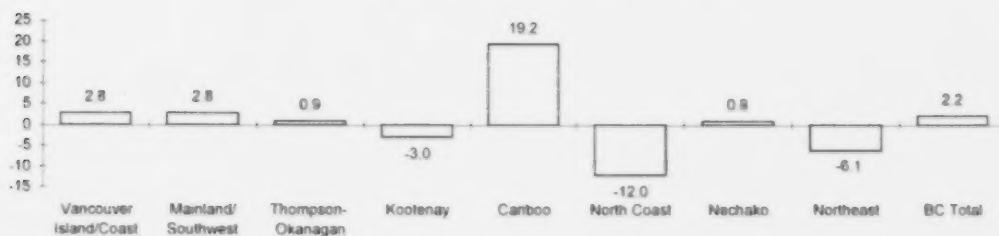
December month-over-month percent growth


Table 2: Room Revenue by Accommodation Type (\$000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous Incl. Fishing Lodges
	251+	151-250	76-150	1-75			

Annual data

2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423
2004	467,644	198,608	321,679	185,691	194,927	124,384	98,774

Annual growth rates

2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
2004	6.8	9.8	8.2	6.6	7.5	4.1	3.5

Monthly data

Dec-03	38,148	15,848	25,715	15,016	16,749	10,630	8,906
Jan-04	37,014	15,900	25,954	15,124	15,811	9,699	8,312
Feb-04	37,377	15,637	25,985	14,853	15,813	9,896	8,160
Mar-04	38,809	16,216	26,192	14,969	15,933	9,215	7,423
Apr-04	40,105	15,783	26,737	15,369	15,762	9,928	7,933
May-04	40,275	16,394	26,873	15,365	15,865	10,181	7,955
Jun-04	40,048	16,690	26,951	15,583	16,147	10,155	8,083
Jul-04	38,822	16,562	27,174	15,790	16,467	10,412	8,472
Aug-04	37,601	16,367	26,179	15,410	15,404	10,348	8,285
Sep-04	40,077	17,126	27,213	15,930	16,319	10,678	8,713
Oct-04	37,258	16,737	27,142	16,009	16,560	11,231	8,362
Nov-04	37,783	17,723	27,832	15,755	17,620	11,262	8,646
Dec-04	42,475	17,472	27,448	15,533	17,228	11,379	8,430

Month-over-month growth rates

Dec-03	1.8	1.7	0.4	2.7	8.5	7.8	19.1
Jan-04	-3.0	0.3	0.9	0.7	-5.6	-8.8	-6.7
Feb-04	1.0	-1.7	0.1	-1.8	0.0	2.0	-1.8
Mar-04	3.8	3.7	0.8	0.8	0.8	-6.9	-9.0
Apr-04	3.3	-2.7	2.1	2.7	-1.1	7.7	6.9
May-04	0.4	3.9	0.5	0.0	0.7	2.5	0.3
Jun-04	-0.6	1.8	0.3	1.4	1.8	-0.3	1.6
Jul-04	-3.1	-0.8	0.8	1.3	2.0	2.5	4.8
Aug-04	-3.1	-1.2	-3.7	-2.4	-6.5	-0.6	-2.2
Sep-04	6.6	4.6	3.9	3.4	5.9	3.2	5.2
Oct-04	-7.0	-2.3	-0.3	0.5	1.5	5.2	-4.0
Nov-04	1.4	5.9	2.5	-1.6	6.4	0.3	3.4
Dec-04	12.4	-1.4	-1.4	-1.4	-2.2	1.0	-2.5

December month-over-month percent growth

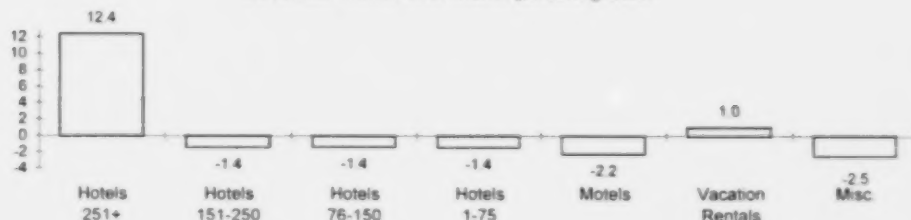


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		#	# chg from	#	# chg from
	Dec-04	YTD 04	Dec-03	YTD 03				
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	6,977	167,113	14.6	8.6	156	9	8,102	277
Total - Hotels	5,828	136,783	17.1	9.2	65	2	5,571	268
76+ Rooms	4,414	104,863	17.1	10.3	26	1	3,937	236
1-75 Rooms	1,415	31,920	16.9	5.8	39	1	1,634	32
Motels	547	14,236	9.4	2.0	27	0	1,034	-16
Vacation Rentals	207	5,127	29.9	-2.1	24	4	308	22
19 Cowichan Valley								
Total - All accommodation types	350	8,268	-4.4	1.5	33	-1	667	-4
Motels	73	1,890	-1.2	6.3	16	1	316	20
21 Nanaimo								
Total - All accommodation types	1,993	38,415	14.2	6.0	67	0	2,581	-152
Total - Hotels	1,118	19,498	18.1	8.1	21	0	1,286	-166
Motels	375	7,908	9.1	6.1	26	1	651	24
Vacation Rentals	437	9,247	12.0	3.5	16	0	530	-4
23 Alberni-Clayoquot								
Total - All accommodation types	1,664	38,742	23.9	12.1	55	1	1,308	56
Motels	137	3,975	44.5	4.8	20	1	412	52
Vacation Rentals	650	13,756	41.0	20.8	16	2	338	51
25 Comox-Strathcona								
Total - All accommodation types	1,807	30,925	0.7	5.6	59	0	1,664	15
Motels	415	7,455	-1.1	4.1	25	0	664	-1
Vacation Rentals	489	3,982	0.5	7.7	16	2	218	31
27 Powell River								
Total - All accommodation types	-	-	-	-	19	1	387	-2
43 Mount Waddington								
Total - All accommodation types	204	5,426	-8.5	-2.7	19	-1	563	-87
45 Central Coast								
Total - All accommodation types	-	-	-	-	8	1	107	5
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	2,926	38,894	-14.6	5.5	69	-1	2,571	-45
Total - Hotels	2,272	28,028	-16.6	4.8	20	-1	1,414	-16
Motels	350	7,884	-5.0	8.0	36	-2	939	-40
15 Greater Vancouver								
Total - All accommodation types	32,005	635,129	12.5	10.1	230	0	25,370	-343
Total - Hotels	30,108	598,515	12.4	10.2	158	-3	22,929	-393
251+ Rooms	15,746	327,348	18.1	10.5	24	-1	9,678	-278
151-250 Rooms	5,941	113,410	7.2	9.5	25	0	4,752	0
76-150 Rooms	6,388	117,457	12.8	10.3	53	-1	5,764	-82
1-75 Rooms	2,033	40,300	-9.7	8.6	56	-1	2,735	-33
Motels	978	17,604	13.1	10.4	35	1	1,526	33
Vacation Rentals	643	8,520	12.0	11.6	18	1	587	14
29 Sunshine Coast								
Total - All accommodation types	136	4,213	1.8	10.6	18	1	334	28
31 Squamish-Lillooet								
Total - All accommodation types	29,323	184,956	7.3	-4.2	104	3	7,589	382
Total - Hotels	22,746	149,236	7.4	-3.0	46	2	5,703	267
76-150 Rooms	4,990	37,013	2.7	-1.0	15	0	1,519	0
1-75 Rooms	1,405	12,378	-14.1	-3.6	20	1	755	-5
Vacation Rentals	5,158	24,944	12.2	-7.7	32	2	1,300	78
Miscellaneous	1,316	8,907	-7.9	-13.9	18	-1	414	37
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	1,067	40,213	-3.8	7.6	93	-4	2,799	-145
Total - Hotels	584	19,558	-11.4	3.9	15	-4	1,021	-259
Motels	314	16,526	-1.7	11.3	62	0	1,511	14

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Dec-04	YTD 04	Dec-03	YTD 03	Dec-04	Dec-03	Dec-04	Dec-03
33 Thompson-Nicola								
Total - All accommodation types	3,993	62,979	5.9	12.4	140	-3	5,302	-58
Total - Hotels	1,602	28,866	14.6	15.9	35	1	2,220	17
1-75 Rooms	288	5,834	-4.2	3.6	23	1	832	18
Motels	777	19,510	-11.4	12.3	78	-2	2,318	-38
Vacation Rentals	1,367	8,826	8.7	7.8	11	-1	448	-8
35 Central Okanagan								
Total - All accommodation types	3,886	68,490	8.5	5.3	64	4	3,613	-53
Total - Hotels	2,355	45,165	9.1	5.4	22	1	1,916	4
76+ Rooms	1,903	39,400	8.9	5.8	11	0	1,477	0
1-75 Rooms	452	5,765	10.1	3.4	11	1	439	4
Motels	460	13,623	-10.8	1.5	24	-1	1,107	-10
Vacation Rentals	1,015	7,384	18.1	9.7	13	3	418	-72
37 North Okanagan								
Total - All accommodation types	2,045	19,721	15.4	-1.1	40	0	1,564	-57
Total - Hotels	1,384	11,358	19.3	-4.0	14	0	806	0
Motels	268	6,064	1.3	18.6	17	-2	568	-74
39 Columbia-Shuswap								
Total - All accommodation types	1,642	38,014	15.9	8.7	89	2	2,911	59
Total - Hotels	721	16,629	14.3	9.2	18	0	1,032	-3
Motels	615	14,091	11.0	10.7	43	-2	1,444	-46
Miscellaneous	228	4,115	46.8	6.9	22	4	370	100
Kootenay								
01 East Kootenay								
Total - All accommodation types	3,705	52,358	-5.4	6.0	102	-10	4,222	-262
Total - Hotels	1,205	16,177	8.5	1.8	25	-1	1,514	-48
Motels	526	11,287	9.1	6.9	40	-4	1,019	-42
Vacation Rentals	1,114	11,382	8.1	16.9	16	-4	1,002	133
03 Central Kootenay								
Total - All accommodation types	820	18,349	9.6	7.5	70	7	1,440	107
Total - Hotels	522	10,114	15.3	10.1	19	3	765	100
Motels	180	4,667	1.5	-2.1	28	0	514	2
Vacation Rentals	63	1,512	26.0	17.0	11	0	70	1
05 Kootenay Boundary								
Total - All accommodation types	348	6,175	-2.3	8.6	36	1	690	0
Motels	147	3,499	-0.8	9.4	23	0	394	-8
Cariboo								
41 Cariboo								
Total - All accommodation types	985	17,631	13.2	4.6	71	0	1,773	57
Motels	498	8,985	11.3	4.5	35	0	1,025	-1
Vacation Rentals	74	1,142	2.9	-12.9	13	-4	166	34
53 Fraser-Fort George								
Total - All accommodation types	1,813	28,499	36.5	8.7	53	3	2,536	67
Total - Hotels	1,248	19,863	30.7	6.9	19	1	1,474	82
Motels	527	7,612	51.5	13.7	29	0	970	-8
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	283	11,988	-22.2	2.3	25	-1	919	-10
Motels	75	2,353	2.4	7.2	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	402	8,172	-13.9	6.9	30	1	777	7
Motels	176	2,943	1.9	1.6	17	2	392	15
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	469	8,811	3.4	-1.3	44	3	1,141	61
Motels	258	4,924	1.3	-2.6	26	1	695	44
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	3,971	51,889	4.4	12.2	75	3	3,851	796
Total - Hotels	1,778	24,589	1.7	22.7	24	2	1,589	52
Motels	945	12,602	-9.3	10.6	33	-1	921	-25
Vacation Rentals	1,101	13,107	15.1	-5.7	12	-1	1,100	615

"-" Data for regions with fewer than 10 properties reporting can not be released.

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Dec-04	YTD 04	Dec-03	YTD 03	Dec-04	Dec-03	Dec-04	Dec-03
Vancouver Island/Coast	13,213	295,225	12.3	8.1	415	10	15,379	108
Victoria (C)	5,625	132,599	14.3	8.7	79	6	5,657	377
Other CRD	1,352	34,514	15.9	7.7	76	3	2,445	-100
Nanaimo (C)	1,216	20,046	13.3	8.8	23	0	1,230	-4
Port Alberni (C)	227	3,881	53.5	12.4	13	1	344	-9
Courtenay (C)	654	8,287	3.1	2.9	13	1	525	10
Rest of Development Region	4,140	95,899	8.4	7.8	224	0	5,178	-166
Mainland/Southwest	64,390	863,192	8.5	6.5	421	3	35,864	22
Downtown Vancouver (C)	18,997	407,525	16.2	10.9	83	0	12,809	-112
Other Vancouver (C)	1,670	32,200	17.2	5.5	32	-1	2,655	-65
Richmond (C)	5,883	98,006	7.9	9.9	24	1	4,371	50
Burnaby (C)	1,293	26,600	1.3	8.2	10	0	937	-93
Other GVRD	4,162	70,799	5.7	8.9	81	0	4,598	30
Whistler (DM)	28,886	178,341	7.5	-4.3	80	1	6,971	299
Rest of Development Region	3,500	49,721	-13.1	4.6	111	2	3,523	-87
Thompson/Okanagan	12,633	229,418	8.4	7.6	426	-1	16,189	-254
Penticton (C)	686	23,801	-7.8	8.5	40	-3	1,611	-206
Kamloops (C)	3,370	47,932	7.2	15.4	66	1	3,643	45
Kelowna (C)	3,713	61,183	10.5	5.0	55	4	3,183	78
Vernon (C)	2,013	18,356	15.2	-1.6	32	-1	1,444	-66
Revelstoke (C)	669	14,186	12.8	7.3	25	-1	1,017	-13
Rest of Development Region	2,182	63,960	5.7	6.9	208	-1	5,291	-92
Kootenay	4,874	76,882	-3.0	6.6	208	-2	6,352	-155
Cranbrook (C)	407	8,034	5.4	1.3	17	-2	794	-98
Nelson (C)	343	6,403	10.1	5.4	11	0	419	2
Rest of Development Region	4,123	62,445	-4.7	7.4	191	0	5,558	-57
Cariboo	2,798	46,130	27.3	7.1	124	3	4,309	124
Quesnel (C)	201	3,500	4.3	0.5	13	0	452	0
Williams Lake (C)	246	4,882	16.0	7.9	11	0	534	0
Prince George (C)	1,401	21,184	36.1	6.7	30	2	1,822	114
Rest of Development Region	948	16,564	24.3	9.0	70	1	1,501	10
North Coast	685	20,160	-17.6	4.1	55	0	1,696	-3
Prince Rupert (C)	227	7,025	-31.2	2.0	15	0	761	0
Terrace (C)	247	4,665	-	-	10	1	396	33
Rest of Development Region	211	8,469	-	-	30	-1	539	-36
Nechako	469	8,811	3.4	-1.3	44	3	1,141	61
Smithers (T)	182	4,237	2.5	3.1	12	0	418	18
Rest of Development Region	287	4,574	3.9	-5.1	32	3	723	323
Northeast	3,971	51,889	4.4	12.2	75	3	3,851	796
Dawson Creek (C)	486	6,800	44.7	19.1	13	-1	486	-9
Fort St. John (C)	1,697	21,189	7.0	17.0	22	1	1,767	35
Rest of Development Region	1,787	23,900	-5.0	6.5	40	3	1,598	770

"-" Data for regions with fewer than 10 properties reporting can not be released.

Table 5: Historical Unadjusted Room Revenue by Development Region (\$000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,225	863,192	229,418	76,882	46,130	20,160	8,811	51,889	1,591,707

Annual growth rates

2000	2.9	8.6	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.1	6.5	7.5	6.5	7.1	4.1	-1.3	12.2	7.1

Monthly data

Dec-03	11,763	59,336	11,652	5,024	2,199	831	454	3,803	95,060
Jan-04	10,891	59,523	12,523	5,875	2,276	791	415	4,428	96,722
Feb-04	14,125	68,452	15,086	8,185	2,450	1,033	459	6,323	116,112
Mar-04	17,288	74,357	15,792	7,768	3,224	1,040	507	6,565	126,540
Apr-04	19,495	63,507	12,696	5,004	3,223	1,056	545	3,660	109,186
May-04	25,608	71,530	18,051	4,761	3,831	1,504	652	2,397	128,335
Jun-04	31,380	81,609	21,957	5,917	4,691	2,786	984	3,231	152,555
Jul-04	44,238	98,094	37,573	9,647	5,472	3,434	1,051	3,896	203,405
Aug-04	49,430	101,639	37,084	10,120	6,103	3,253	1,100	4,029	212,758
Sep-04	35,174	81,870	23,590	7,535	5,209	2,367	1,172	4,075	160,992
Oct-04	20,981	55,010	13,953	4,314	3,996	1,251	886	5,132	105,523
Nov-04	13,403	43,211	8,480	2,883	2,856	959	570	4,183	76,544
Dec-04	13,213	64,390	12,633	4,874	2,798	685	469	3,971	103,033

Year-over-year percent changes

Dec-03	4.6	0.0	12.7	13.6	6.6	27.1	3.0	70.9	4.8
Jan-04	13.9	-4.4	3.3	8.0	1.1	8.0	-6.0	10.5	-0.1
Feb-04	9.7	-5.5	11.6	12.1	8.4	6.9	-14.0	24.7	1.0
Mar-04	3.8	1.4	7.0	0.3	7.8	-7.2	-15.9	-4.2	2.0
Apr-04	5.9	14.1	6.7	15.2	1.0	5.0	7.0	4.8	10.8
May-04	4.7	11.6	10.5	1.7	1.3	4.3	-2.1	-2.2	8.8
Jun-04	9.0	17.0	2.6	5.0	4.6	6.8	6.0	12.0	11.8
Jul-04	12.4	13.9	14.3	11.6	5.9	10.7	-0.7	3.6	12.9
Aug-04	5.2	0.4	0.2	1.5	9.6	4.7	-3.6	1.3	1.8
Sep-04	11.8	12.8	17.8	13.1	9.1	1.2	7.4	15.2	13.0
Oct-04	5.4	5.2	1.1	1.6	5.9	3.7	-8.0	48.5	5.9
Nov-04	5.1	4.3	5.5	16.1	8.9	6.2	5.9	41.0	6.7
Dec-04	12.3	8.5	8.4	-3.0	27.3	-17.5	3.4	4.4	8.4

December year-over-year percent change

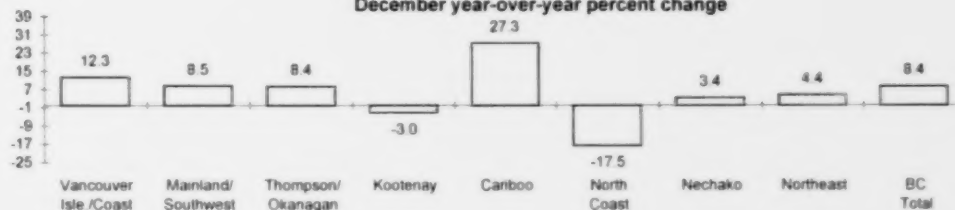


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**

Annual data

1999	8,269.2	6,861.7	3,370.2	3,491.5	1,407.5	716.0	484.6	126.0
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,970.8	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.8	118.0
2003	7,335.3	6,137.4	2,580.7	3,556.7	1,197.8	577.6	410.1	124.8
2004	7,414.7	6,025.8	2,493.8	3,545.3	1,388.9	715.8	458.1	144.3

Annual percent changes

1999	5.4	4.8	7.9	2.0	8.6	9.7	7.8	6.6
2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.1	-4.3	-13.8	4.2	-3.0	4.4	-11.7	-10.5
2003	-8.0	-7.0	-8.1	-6.1	-12.9	-24.4	-0.4	5.8
2004	1.1	-1.8	-3.4	-0.3	15.9	23.9	11.7	15.6

Monthly data

Jan-04	594.5	485.0	211.8	289.9	109.5	57.6	34.7	12.0
Feb-04	600.5	489.7	210.3	287.4	110.8	57.3	36.1	11.0
Mar-04	611.0	504.8	215.2	299.1	106.2	59.3	36.2	9.3
Apr-04	625.6	509.3	213.3	299.8	116.3	63.3	37.0	11.7
May-04	627.2	503.6	210.5	297.6	123.6	65.7	39.3	13.1
Jun-04	635.1	510.6	216.2	294.9	124.5	67.9	39.5	12.9
Jul-04	629.6	509.0	212.3	296.7	120.6	60.1	41.8	12.8
Aug-04	610.1	495.5	203.4	293.3	114.6	56.0	38.8	12.6
Sep-04	650.6	530.8	204.8	303.7	119.9	58.5	40.5	12.7
Oct-04	613.8	495.8	201.5	293.8	118.0	58.8	39.6	11.7
Nov-04	607.3	496.1	199.1	297.3	111.2	56.3	35.7	12.1
Dec-04	609.4	495.8	195.2	291.8	113.6	55.1	39.0	12.2
Jan-05	580.9	468.1	183.2	289.0	112.8	53.5	40.0	12.4

Month-over-month growth rates

Jan-04	-3.0	-3.9	1.7	-1.0	1.2	1.7	-0.6	7.5
Feb-04	1.0	1.0	-0.7	-0.9	1.2	-0.4	4.1	-8.2
Mar-04	1.8	3.1	2.4	4.1	-4.1	3.5	0.4	-15.3
Apr-04	2.4	0.9	-0.9	0.2	9.5	6.8	1.9	25.1
May-04	0.3	-1.1	-1.4	-0.7	6.3	3.7	6.3	12.2
Jun-04	1.3	1.4	2.7	-0.9	0.7	3.3	0.5	-1.8
Jul-04	-0.9	-0.3	-1.8	0.6	-3.1	-11.5	6.0	-0.8
Aug-04	-3.1	-2.7	-4.2	-1.2	-5.0	-6.8	-7.4	-1.1
Sep-04	6.7	7.1	0.7	3.6	4.6	4.5	4.4	0.5
Oct-04	-5.7	-6.6	-1.6	-3.3	-1.6	0.4	-2.1	-7.9
Nov-04	-1.1	0.1	-1.2	1.2	-5.7	-4.2	-9.9	3.3
Dec-04	0.3	-0.1	-2.0	-1.9	2.2	-2.1	9.2	0.7
Jan-05	-4.7	-5.6	-6.2	-1.0	-0.7	-2.8	2.6	1.5

* Seasonal adjustment of total US entries are calculated by Statistics Canada and are adjusted to sum to national totals, therefore same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)				Other Transportation (000s)			
	Vancouver				Victoria	BC Ferries		Coquitella Hwy Passenger Vehicles
	Total	Domestic	Trans-border	Other Int'l.		Vehicles	Passengers	

Annual data

1999	15,806	8,314	4,120	3,372	1,191	7,852	21,369	2,388
2000	16,033	8,306	4,074	3,652	1,139	7,887	21,280	2,400
2001	15,477	7,869	4,000	3,608	1,158	8,104	21,309	2,461
2002	14,877	7,422	3,855	3,600	1,102	8,272	21,540	2,530
2003	14,322	7,267	3,815	3,241	1,183	8,263	21,348	2,480
2004	15,725	7,986	3,964	3,775	1,250	8,532	21,953	2,586

Annual growth rates

1999	1.9	1.2	-0.1	6.4	-1.9	0.4	-0.2	0.5
2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.6	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.8	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0
2004	9.8	9.9	3.9	16.5	5.7	3.3	2.8	4.3

Monthly data

Jan-04	1,246	628	318	300	103	685	1,760	203
Feb-04	1,286	664	325	297	105	710	1,821	214
Mar-04	1,276	649	326	301	102	714	1,840	223
Apr-04	1,305	653	338	314	104	715	1,862	220
May-04	1,317	658	330	330	103	702	1,822	217
Jun-04	1,323	668	323	332	103	703	1,810	213
Jul-04	1,316	671	322	324	104	708	1,819	218
Aug-04	1,303	657	329	317	100	695	1,777	209
Sep-04	1,344	685	339	320	109	711	1,830	221
Oct-04	1,321	671	336	314	104	717	1,848	214
Nov-04	1,341	686	341	315	105	725	1,864	220
Dec-04	1,347	696	338	313	107	748	1,899	215
Jan-05	1,367	712	345	311	108	681	1,721	208

Month-over-month growth rates

Jan-04	-1.6	-2.3	-1.5	-0.1	-1.8	7.7	6.4	-2.8
Feb-04	3.1	5.8	2.1	-1.3	1.9	3.7	3.5	5.1
Mar-04	-0.7	-2.2	0.3	1.5	-3.2	0.5	1.1	4.1
Apr-04	2.2	0.6	3.5	4.3	2.3	0.1	1.2	-1.0
May-04	0.9	0.7	-2.4	5.0	-1.6	-1.7	-2.1	-1.6
Jun-04	0.5	1.6	-2.1	0.7	0.6	0.1	-0.6	-1.7
Jul-04	-0.5	0.4	-0.2	-2.5	0.9	0.8	0.5	2.1
Aug-04	-1.0	-2.0	2.1	-2.0	-3.7	-1.9	-2.3	-4.2
Sep-04	3.1	4.2	3.2	0.8	9.1	2.3	3.0	5.7
Oct-04	-1.8	-2.1	-1.0	-1.8	-5.3	0.8	1.0	-3.0
Nov-04	1.6	2.2	1.5	0.3	1.0	1.2	0.9	2.9
Dec-04	0.4	1.6	-0.8	-0.6	2.3	3.2	1.9	-2.4
Jan-05	1.5	2.2	2.0	-0.6	0.9	-9.0	-9.4	-3.2

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel Industry ²		Consumer Price Index ¹	
	Total tourism related	Air transport ⁴	Accommodation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%) ³	Room Rate (\$)	Traveller accommodation	Restaurant food ⁴
Annual data									
1999	181.7	15.3	29.2	110.1	27.1	61.7	112.03	133.1	115.6
2000	188.4	14.8	28.2	116.7	28.8	60.0	114.04	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.13	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	117.00	124.1	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	113.73	111.8	127.6
2004	193.2	13.0	27.6	117.8	34.8	61.7	115.68	102.5	129.9
Annual Growth Rates									
1999	-1.5	-3.6	-0.5	0.4	-8.5	-0.2	3.1	2.4	1.5
2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.6	0.7	-6.9	3.3
2003	1.1	4.4	-0.7	-0.3	6.8	-1.1	-2.8	-9.9	1.8
2004	0.2	2.2	-4.8	0.0	4.2	5.8	1.7	-8.4	1.8
Monthly data									
Jan-04	194.4	12.8	27.6	120.2	33.9	60.3	114.00	103.3	128.8
Feb-04	193.7	13.0	27.5	119.7	33.5	59.3	113.40	102.7	129.0
Mar-04	193.8	12.7	27.5	118.4	35.2	61.2	113.50	102.9	129.2
Apr-04	192.4	12.7	27.7	117.5	34.5	62.1	115.90	102.7	129.6
May-04	192.9	12.8	28.5	117.3	34.4	62.0	115.80	102.6	129.8
Jun-04	192.6	13.2	27.6	117.6	34.2	62.6	115.70	102.4	129.9
Jul-04	192.2	13.0	27.6	117.0	34.5	61.8	116.10	102.0	129.9
Aug-04	193.6	13.2	27.3	117.5	35.6	59.7	116.00	100.9	129.7
Sep-04	193.5	13.2	27.6	117.0	35.7	62.4	116.80	101.8	130.0
Oct-04	190.6	13.3	27.4	115.4	34.4	62.1	116.10	101.9	130.3
Nov-04	193.5	13.2	27.2	117.5	35.6	62.9	117.30	103.2	130.6
Dec-04	194.9	13.1	27.5	118.1	36.2	63.7	117.60	103.5	131.8
Jan-05	194.5	13.3	27.6	118.0	35.7	-	-	104.2	131.6
Month-over-month growth rates									
Jan-04	0.6	4.0	-2.2	0.5	2.4	0.1	-0.2	-2.8	0.2
Feb-04	-0.4	1.6	-0.2	-0.4	-1.1	-1.0	-0.5	-0.6	0.2
Mar-04	0.0	-1.7	-0.1	-1.2	5.0	1.9	0.1	0.2	0.2
Apr-04	-0.7	-0.2	0.6	-0.7	-1.9	0.9	2.1	-0.2	0.3
May-04	0.3	0.6	2.8	-0.2	-0.3	-0.1	-0.1	-0.1	0.2
Jun-04	-0.2	3.1	-3.1	0.3	-0.6	0.6	-0.1	-0.2	0.1
Jul-04	-0.2	-1.5	0.3	-0.5	1.0	-0.8	0.3	-0.4	0.0
Aug-04	0.7	1.5	-1.1	0.4	3.0	-2.1	-0.1	-1.1	-0.2
Sep-04	-0.1	0.3	0.9	-0.5	0.5	2.7	0.7	0.9	0.2
Oct-04	-1.5	0.8	-0.7	-1.3	-3.7	-0.3	-0.6	0.1	0.2
Nov-04	1.5	-0.8	-0.7	1.8	3.4	0.8	1.0	1.3	0.2
Dec-04	0.7	-0.8	1.0	0.5	1.9	0.8	0.3	0.3	0.9
Jan-05	-0.2	1.0	0.4	-0.1	-1.4	-	-	0.7	-0.2

¹Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

²Source: Pannell Kerr Forster and BC Stats

³Occupancy Rate change expressed as percentage point change

⁴No identifiable seasonality.

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns ¹					
	Receipts (\$ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services

Annual data

2000	4,860.6	358.9	4,472.6	32,136.4	2,210.4	28,034.1
2001	5,207.5	357.9	4,818.4	34,212.1	2,280.9	29,950.2
2002	5,131.9	305.9	4,795.3	35,236.8	2,241.2	30,893.5
2003	5,406.1	284.4	5,104.3	35,641.0	2,089.1	31,559.8
2004	5,822.4	-	-	37,502.1	-	-

Annual growth rates

1999	-3.7	-7.3	-3.4	4.3	12.9	3.6
2000	8.1	-2.9	9.1	7.3	8.4	7.4
2001	7.1	-0.3	7.7	6.5	3.2	6.8
2002	-1.5	-14.6	-0.5	3.0	-1.7	3.1
2003	5.3	-7.0	6.4	1.1	-6.8	2.2
2004	7.7	-	-	5.2	-	-

Monthly data

Jan-04	464	22	456	3,062	158	2,711
Feb-04	461	23	463	3,120	166	2,757
Mar-04	464	23	475	3,118	169	2,771
Apr-04	483	24	494	3,117	167	2,781
May-04	486	-	-	3,122	-	-
Jun-04	486	-	-	3,102	-	-
Jul-04	480	-	-	3,071	-	-
Aug-04	473	-	-	3,111	-	-
Sep-04	497	-	-	3,146	-	-
Oct-04	498	-	-	3,179	-	-
Nov-04	526	-	-	3,204	-	-
Dec-04	504	-	-	3,150	-	-
Jan-05	509	-	-	3,060	-	-

Month-over-month growth rates

Jan-04	-2.7	-5.5	0.5	0.4	-5.4	-0.2
Feb-04	-0.6	1.2	1.4	1.9	5.3	1.7
Mar-04	0.6	1.3	2.6	-0.1	1.9	0.5
Apr-04	4.2	5.9	4.0	0.0	-1.3	0.4
May-04	0.5	-	-	0.2	-	-
Jun-04	0.1	-	-	-0.6	-	-
Jul-04	-1.2	-	-	-1.0	-	-
Aug-04	-1.6	-	-	1.3	-	-
Sep-04	5.3	-	-	1.1	-	-
Oct-04	0.1	-	-	1.0	-	-
Nov-04	5.6	-	-	0.8	-	-
Dec-04	-4.1	-	-	-1.7	-	-
Jan-05	1.0	-	-	-2.9	-	-

¹Source: Statistics Canada & BC Stats.

Data for food services and drinking places are currently not available

Explanatory Notes

Data Sources

All room revenue data reported is compiled by BC STATS using the hotel tax database maintained and administered by the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Traveller Entry data is from Statistics Canada. All other data sources are accredited within the report.

Accommodation Categories

Each property has been assigned to one of eight accommodation categories. In addition to motels and four sizes of hotels, there are three special accommodation categories:

Fishing Lodges – All inland and coastal fishing camps located on or near lakes, rivers and oceans. Includes lodges which offer inland fishing expeditions, marinas with accommodation and lodges offering the services of fishing guides.

Vacation Rentals – Includes beach houses, cabins, and selected trailer parks. May also include certain inns and apartment complexes.

Miscellaneous – Includes guest ranches; outfitting, adventure hunting and other types of outdoor adventure; lodges that cater to skiers, hikers, etc. (with the exception of those lodges that mainly service cabins); bed and breakfasts; and houseboats. Also includes universities, mining firms, farms and other establishments renting rooms whose primary activity is not accommodation.

Seasonally Adjusted Data

Accommodation revenue exhibits large, regular seasonal fluctuations, characterised by peaks in the summer months and troughs in the winter months.

The *Tourism Sector Monitor* report uses Statistics Canada's X11/ARIMA/88 technique to remove the effects of seasonality from the revenue time series. The resulting seasonally adjusted series provides a useful tool for the analysis of underlying trends in accommodation revenue.

Unless otherwise indicated, revenue data in the *Tourism Sector Monitor* report is adjusted for seasonal fluctuations.

Tourism Sector Monitor is prepared by BC STATS, Ministry of Management Services, using data from the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Limitations

The data reported here is derived from the hotel tax database. Tax is not payable for several kinds of accommodation, including:

1. properties with three or fewer rooms (such as small bed and breakfast operations);
2. room rentals exceeding one month in duration;
3. lodging where the daily rate is below \$20;
4. lodging supplied to passengers of a ship or train while the ship or train is in transit or is making a scheduled stopover in the Province;
5. lodging supplied by employers to employees; and,
6. lodging supplied to consular employees and their staff.

Readers wishing more information regarding the nature of the hotel tax are referred to the Hotel Room Tax Act and the Hotel Room Tax Regulations.

Room Counts

Data are obtained primarily from Tourism BC's *Accommodation Guide* and supplemented by estimates from the Consumer Taxation Branch's hotel tax file. Vendors and their rooms are not counted in any given month unless revenue has been reported.

Suppression

The protection of confidentiality requires the suppression of categories not containing at least four properties. In most cases, protection is achieved by aggregating confidential cells into larger categories.

Revisions

A standard revision cycle accommodates corrections to the source data, to the allocation of consolidated reporters, and to the coding of properties by accommodation type. Revisions are implicit in the seasonally adjusted data and in the month-over-month, year-over-year and year-to-date percentage changes of subsequent reports, and are comprehensively reported in the annual tables published in the Annual issue of the *Tourism Sector Monitor* report.

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Tourism Sector Monitor ♦ April 2005

Room Revenue

Room revenues decreased in January (-2.1%, *seasonally adjusted*), following two months of growth. Five regions posted declines, which were especially marked in Cariboo (-18.6%), and Mainland/ South-west (-2.9%). The particularly sharp decline in the Cariboo region was due to an adjustment from December, when a number of establishments reported higher than usual earnings.

Room revenues fell in January

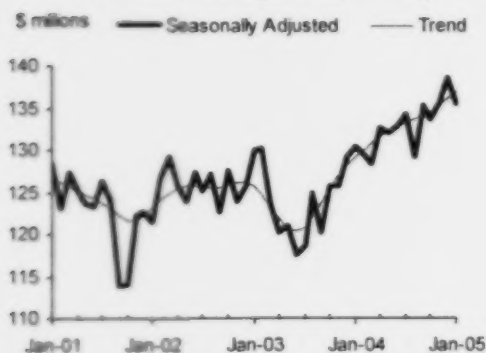


Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type			
	Jan 05 (\$000)	Dec 04 (\$000)	% change
Total	135,608	138,475	-2.1
Hotels	97,527	102,637	-5.0
Motels	16,454	17,161	-4.1
Other Acc.	19,709	19,972	-1.3
Regions (Top 3 performers)			
Northeast	5,197	4,838	+7.4
Nechako	814	764	+6.5
North Coast	1,612	1,532	+5.2

Revenues bounced back in Northeast (+7.4%) and North Coast (+5.2%) in January. Northeast's temporary accommodation for workers boosted overall revenues although revenues were also up in other parts of the region. Smithers, which hosted the crew filming Disney's adventure movie "Antarctica", accounted for much of the increase in Nechako (+6.5%).

Virtually all accommodation types saw slower business in January. Very large hotels (251+ rooms, -8.4%), large hotels (151-250 rooms, -4.4%) and motels (-4.1%) experienced substantial losses.

Visitor Entries

The decrease in room revenues corresponds to a drop in visitors entering the province. The volume of travellers entering Canada via BC borders fell (-5.2%, *seasonally adjusted*) in January. This was mostly due to fewer travellers from the US. Same-day visits from the US were down 9.4%, while overnight visits dropped 1.0%.

Overseas entries inched down (-0.3%) as continued interest from European visitors (+2.6%) was largely offset by a decrease in Asian travellers (-2.4%). There were fewer entries from Hong Kong (-11.8%), Taiwan (-9.2%) and South Korea (-1.5%), but entries from Japan rose 2.9%. There was continued growth in visitors from Europe, particularly from Germany (+15.6%). The number of visitors from Australia, New Zealand and the South Pacific increased 2.5% in January.

Fewer visitor entries in January

Visitor entries (thousands)

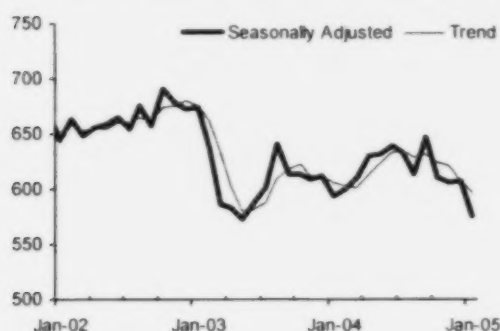


Table 2. Traveller Entries
(seasonally adjusted)

	Jan-05 ('000)	Dec-04 ('000)	% chg from Dec-04
American visitors			
Total	462	493	-6.3
Same-day	180	198	-9.4
Overnight	289	292	-1.0
Overseas visitors			
Total	114	115	-0.3
Europe	40	39	2.6
UK	19	19	0.9
Asia	54	56	-2.4
Japan	18	18	2.9
Taiwan	6	6	-9.2
Oceania	13	12	2.5

(BC STATS & Statistics Canada)

Note: Total Overseas visitors includes areas not shown

Canadian travel abroad declined (-5.9%) as fewer Canadians made same-day trips to the US (-9.5%). Travel to other destinations edged up (+0.2%).

Other Indicators

In the hotel industry, both average room rates (-5.4%) and hotel occupancy (-2.2 percentage points) decreased in January.

Employment in key tourism-related industries edged down (-0.1%). The arts, entertainment & recreation (-1.4%) industries experienced job losses which were offset by an increase in the air transport (+1.1%) sector. There was virtually no

change in the food & beverage services (0.0%) sector.

The Consumer Price Index for traveller accommodation advanced (+0.7%), while the cost of restaurant food (-0.2%) dropped marginally in January.

Transportation indicators were mixed in January. The number of passengers at the Vancouver airport increased (+1.5%). Both domestic (+2.2%) and trans-border (+1.8%) traffic was up from December. Traffic at the Victoria airport also increased (+1.1%). There was a sharp decline in the number of vehicles (-9.1%) and passengers (-9.3%) aboard BC Ferries.

On the Coquihalla Highway, 3.5% fewer passenger vehicles passed through the toll-booths in January.

Restaurant, caterer and tavern receipts increased (+4.7%, *seasonally adjusted*) as both food services (+5.2%) and drinking places (+0.8%) boosted their sales.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Jan-05	Change from Dec-04
Hotel Industry		
Occupancy rate	61.3	-2.2 pp.
Average room charge (Pannell Kerr Forster)	110.80	-5.4%
Airport Passengers (000s) (%)		
Vancouver International Airport		
Total traffic	1,366	1.5
US (trans-border)	343	1.8
Other International	313	-0.4
Canada (domestic) (YVR)	711	2.2
Victoria International Airport		
Total traffic (Victoria Airport Authority)	109	1.1
Restaurant Receipts (\$ millions) (%)		
All establishments	522	4.7
Food service	469	5.2
Drinking places (Statistics Canada)	53	0.8
Transportation (000s) (%)		
Coquihalla Highway		
Passenger Vehicles (Ministry of Transportation & Highways)	208	-3.5
BC Ferries		
Vehicle Volume	681	-9.1
Passenger Volume (BC Ferries)	1,721	-9.3
Exchange Rates Cdn \$		
US \$	0.816	0.00
UK Pound	0.435	0.01
Japanese Yen	84.331	-0.89
Australian \$ (Statistics Canada)	1.066	0.00

Note: pp. percentage points

Note to readers: all data in the *Tourism Sector Monitor* are reported on a seasonally adjusted basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues edged up (+0.6%, *seasonally adjusted*) in February as all but three regions posted month-over-month declines. Revenues were down for the second consecutive month in the two largest development regions, Mainland/Southwest (-1.1%) and Vancouver Island/Coast (-1.8%). Some of the small regions experienced a jump in revenues in February. Nechako (+23.2%) continued to benefit from filming activities in the Smithers area, while Northeast

(+14.3%) revenues remained robust. Revenues generated by smaller hotels (1-75 rooms, +4.5%) and motels (+4.5%) increased in February.

Visitor entries increased in February (+5.0%, *seasonally adjusted*). This was largely due to a significant jump in same-day visits from the US (+10.5%) and Asia (+10.7%).

Transportation indicators were down at the Vancouver airport (-1.0%), but increased at the Victoria (1.9%) airport. There were substantially more passengers (+7.8%) and vehicles (+6.5%) aboard BC Ferries.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

Special Focus: Vancouver Island/Coast

Vancouver Island/Coast is made up of eight regional districts, with the Capital region having the largest number of establishments. Victoria, Nanaimo, Port Alberni and Courtenay are among the urban centres in this region.

Vancouver Island has the mildest climate in Canada, and its temperate winters and relatively mild summers make it a favoured destination for tourists. The region gives visitors the opportunity to experience a variety of outdoor activities such as whale watching, kayaking, fishing, hiking and city attractions while the higher elevations provide an abundance of snow for ski and snowboard enthusiasts. Visitors can also easily reach the picturesque Gulf Islands, view ancient forests, long beaches and abundant marine life. Vancouver Island also includes remote locations such as Bella Coola, which offer unique opportunities for travellers on the mainland. Travellers can find accommodation to suit most tastes and budgets from luxury resorts to campgrounds.

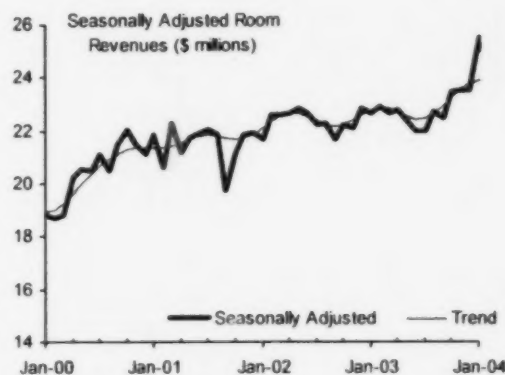
Vancouver Island/Coast room revenues up in 2004

Room revenues at hotels, motels and other establishments in Vancouver Island/Coast increased 8.2% to \$295.2 million in 2004. It is one of four regions that have experienced steady increases in revenues since 2000 (the others being Thompson-Okanagan, Kootenay and Northeast). Northeast leads in terms of room revenue growth since 2000, followed by Thompson-Okanagan, Kootenay and Vancouver Island/Coast.

The region experienced strong average growth (+4.4%) from the turn of the cen-

tury, with increases well above the rate for the province as a whole (+3.7%).

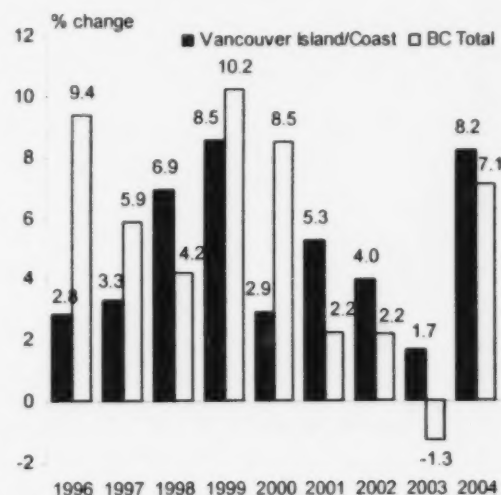
Room revenues soared in 2004



Data Source: BC Stats

The region escaped the post 9/11 slide and the slowdown in 2003 virtually unscathed. Last year was the fourth consecutive year in which Vancouver Island/Coast has outperformed the province in terms of revenue growth.

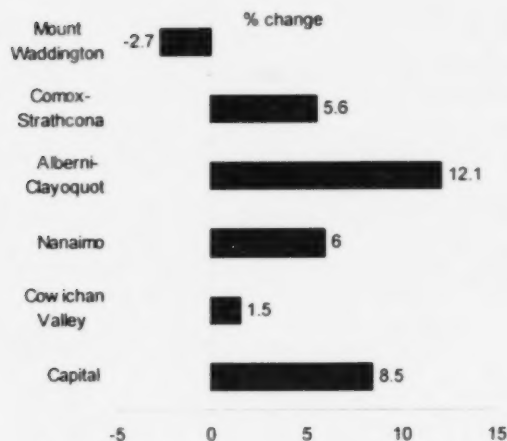
Growth in the region above the rest of the province in 2004



Data Source: BC Stats

This is a reversal from the period of 1996-2000, when revenue growth in Vancouver Island/Coast lagged behind that of the province in every year except 1998.

The Alberni-Clayoquot region surpassed the Capital region in terms of revenue growth in 2004



Data Source: BC Stats

All regional districts experienced strong growth in 2004, with the exception of Mount Waddington (-2.7%). The data for Powell River and Central Coast is confidential and it can not be released.

Revenues jumped in Alberni-Clayoquot (+12.1), surpassing the Capital region (+8.5%), due mostly to a strong performance of vacation rentals (+20.8%) in that region. Revenues increased in Nanaimo as well, due to the strong performance of hotels (+18.1%) and vacation rentals (+12.0%) in 2004.

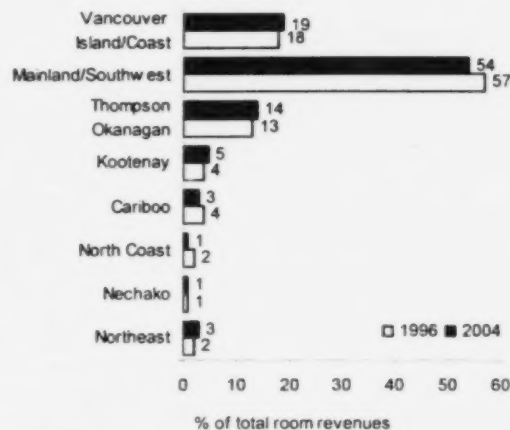
Close to one-fifth of total revenues originate in Vancouver Island/Coast

Last year, Vancouver Island/Coast generated 19% of BC's room revenue about the same as in 2003.

Mainland/Southwest dominates with more than half (55%) of total revenues, but Van-

couver Island/Coast remains second in terms of revenue.

Vancouver Island/Coast accounts for the second largest proportion of provincial room revenues



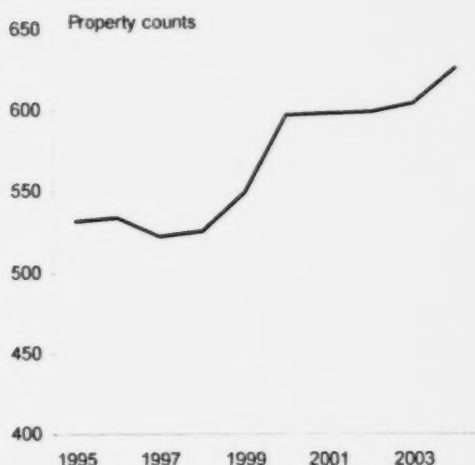
Data Source: BC Stats

Accommodation in the region

In 2004, over 600 properties operated in Vancouver Island/Coast, of which 27% were hotels. The hotels in the region held 52% of the region's rooms and earned 63% of the revenues.

Room numbers and properties did not follow the same growth pattern as room revenues. After a substantial increase in property numbers in 2000 (+8.7%), the number of properties in the region grew at a slower pace. However, last year there were 3.6% more properties and a 3.1% increase in room numbers, which signals increased confidence of business owners in the region's accommodation industry. The jump in property numbers last year is mostly due to more motels (+23.0%), vacation rentals (+21.0%), and small hotels (1-75 rooms, +20.0%).

More accommodation properties in 2004



Data Source: BC Stats

B&Bs have a strong presence in Vancouver Island/Coast, where approximately 13% of all accommodation properties, earning close to 3% of the total revenue, are B&Bs. The market for B&Bs in the Vancouver Island area is well established, possibly because the region has long been a favoured destination for travellers seeking unique lodging alternatives, which offer a much more personalized and cosy atmosphere. The popularity of B&Bs could also be attributed to visitors being interested in learning more about the local lifestyle, which traditional accommodation might not be able to supply. Since 1995 there has been a 24.0% increase in the number of B&B properties and a 30.0% growth in the number of B&B rooms in the region.

Travel to the Region

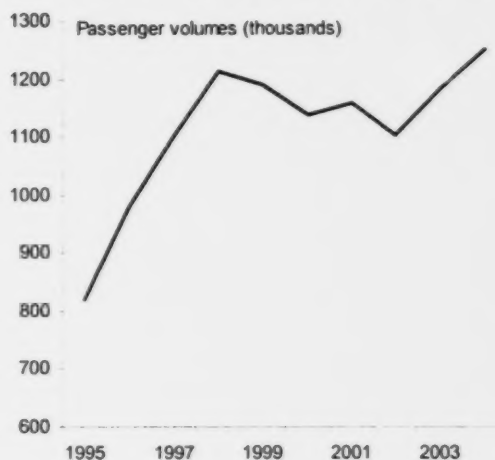
One of the main methods of transportation to Vancouver Island and other coastal communities in the region is by ferry. Vancouver Island is well-connected to mainland BC and Washington State by passenger and vehicle ferries. BC Ferries also

serves the Gulf Islands and other parts of coastal BC.

BC Ferries were busier in 2004, carrying more passengers (+2.8%) and vehicles (+3.3%) to Vancouver Island. However, overall the number of passengers aboard BC Ferries has dropped (-2.0%) to 21.9 million since 1995. There were 2.8% more vehicles aboard BC Ferries relative to 1995.

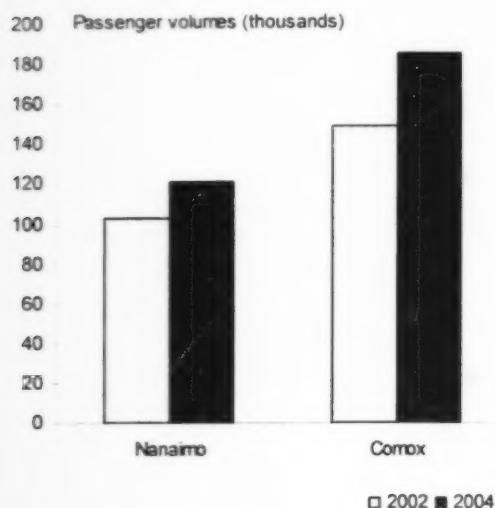
Victoria, Nanaimo and other centres in the region are serviced by commercial as well as charter airlines. There has been spectacular growth in the number of passengers using the Victoria International Airport (+52.4%) since 1995.

Strong growth in the number of passengers to Victoria Airport in the last ten years



The number of passengers travelling through regional airports has also increased. The Comox airport is the busiest regional airport, followed by Nanaimo and Campbell River. Passenger traffic at the Comox Valley airport, which serves the north and central part of the Island, increased (+24.3%) to over 184,900 travellers in 2004.

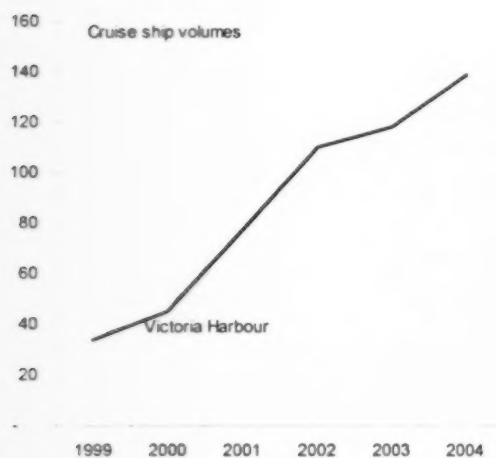
Strong growth in the number of passengers at Comox airport



Data Source: Regional Airport Authority

The number of passengers at the Nanaimo airport soared (+17.8%) in 2004. No figures are available for Campbell River for 2004.

Strong growth in the number of cruise ships to Victoria Harbour



Data Source: Greater Victoria Harbour Authority

There has been phenomenal growth (+208.8%) in the number of cruise ships coming to Victoria Harbour since 2000. Victoria welcomed close to 41% more cruise ship passengers, travelling on 139 ships in

2004. The increase brings a definite boost to tourist attractions, port authorities and businesses in general from spending by cruise ship passengers.

Table 1: Room Revenue by Development Region (\$000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,244	863,427	229,533	76,892	46,162	20,160	8,811	51,889	1,592,118

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	4.1	-1.3	12.2	7.1

Monthly data

Jan-04	25,114	69,810	19,043	6,514	3,597	1,726	702	3,839	130,346
Feb-04	24,026	69,681	18,877	6,657	3,605	1,679	728	4,178	129,430
Mar-04	23,817	68,938	19,146	6,253	3,830	1,601	624	4,165	128,374
Apr-04	23,936	73,098	18,818	6,621	3,637	1,703	802	4,034	132,649
May-04	23,781	73,045	19,178	6,199	3,648	1,648	734	3,804	132,038
Jun-04	24,304	73,346	18,891	6,282	3,774	1,702	748	3,821	132,869
Jul-04	24,571	73,379	19,295	6,518	3,782	1,750	737	4,188	134,222
Aug-04	24,490	69,942	18,331	6,185	3,840	1,716	725	4,000	129,229
Sep-04	25,110	74,002	19,184	6,445	3,821	1,667	763	4,411	135,402
Oct-04	24,666	71,842	19,004	6,327	3,923	1,700	728	5,446	133,636
Nov-04	25,222	72,213	19,839	6,555	3,965	1,736	755	5,165	135,449
Dec-04	26,208	74,130	19,926	6,335	4,742	1,532	764	4,838	138,475
Jan-05	25,969	71,981	19,866	6,309	3,862	1,612	814	5,197	135,608

Month-over-month growth rates

Jan-04	5.8	1.0	0.5	-0.8	-3.8	-5.1	-3.3	-14.5	0.9
Feb-04	-4.3	-0.2	-0.9	2.2	0.2	-2.7	3.7	8.8	-0.7
Mar-04	-0.9	-1.1	1.4	-6.1	6.2	-4.6	-14.3	-0.3	-0.8
Apr-04	0.5	6.0	-1.7	5.9	-5.0	6.3	28.6	-3.2	3.3
May-04	-0.6	-0.1	1.9	-6.4	0.3	-3.2	-8.4	-5.7	-0.5
Jun-04	2.2	0.4	-1.5	1.3	3.5	3.3	1.9	0.5	0.6
Jul-04	1.1	0.0	2.1	3.8	0.2	2.8	-1.5	9.6	1.0
Aug-04	-0.3	-4.7	-5.0	-5.1	1.5	-1.9	-1.6	-4.5	-3.7
Sep-04	2.5	5.8	4.7	4.2	-0.5	-2.9	5.2	10.3	4.8
Oct-04	-1.8	-2.9	-0.9	-1.8	2.7	2.0	-4.5	23.5	-1.3
Nov-04	2.3	0.5	4.4	3.6	1.1	2.1	3.6	-5.2	1.4
Dec-04	3.9	2.7	0.4	-3.4	19.6	-11.7	1.3	-6.3	2.2
Jan-05	-0.9	-2.9	-0.3	-0.4	-18.6	5.2	6.5	7.4	-2.1

January month-over-month percent growth

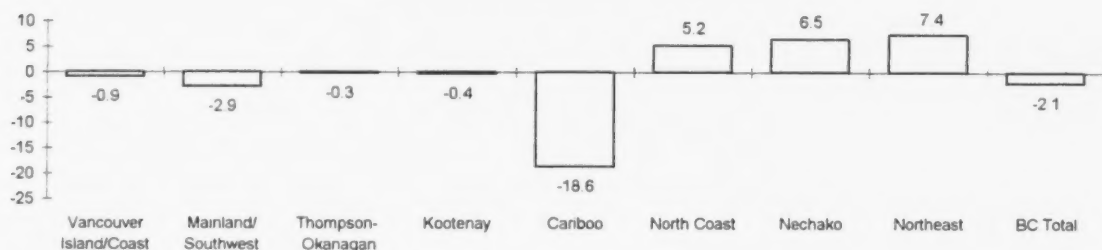


Table 2: Room Revenue by Accommodation Type (\$000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			

Annual data

2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,262	181,383	119,487	95,423
2004	467,820	198,608	321,679	185,692	195,026	124,420	98,872

Annual growth rates

2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
2004	6.8	9.8	8.2	6.6	7.5	4.1	3.6

Monthly data

Jan-04	36,669	16,077	26,203	15,250	15,882	9,390	8,436
Feb-04	37,257	15,670	26,025	14,874	15,847	9,880	8,210
Mar-04	38,661	16,235	26,245	14,969	15,938	9,136	7,448
Apr-04	40,128	15,779	26,762	15,374	15,900	9,940	7,942
May-04	40,281	16,441	26,929	15,407	15,874	10,152	7,963
Jun-04	40,142	16,701	26,908	15,574	16,079	10,123	8,086
Jul-04	38,954	16,546	27,149	15,800	16,472	10,389	8,481
Aug-04	37,676	16,341	26,134	15,402	15,419	10,347	8,292
Sep-04	40,187	17,079	27,108	15,902	16,326	10,707	8,718
Oct-04	37,341	16,683	27,065	16,021	16,471	11,357	8,340
Nov-04	37,917	17,732	27,893	15,672	17,655	11,389	8,595
Dec-04	42,606	17,324	27,257	15,449	17,161	11,611	8,361
Jan-05	39,037	16,558	27,055	14,877	16,454	11,683	8,026

Month-over-month growth rates

Jan-04	-4.0	2.0	2.0	2.0	-4.5	-12.8	-4.3
Feb-04	1.6	-2.5	-0.7	-2.5	-0.2	5.2	-2.7
Mar-04	3.8	3.6	0.8	0.6	0.6	-7.5	-9.3
Apr-04	3.8	-2.8	2.0	2.7	-0.2	8.8	6.6
May-04	0.4	4.2	0.6	0.2	-0.2	2.1	0.3
Jun-04	-0.3	1.6	-0.1	1.1	1.3	-0.3	1.6
Jul-04	-3.0	-0.9	0.9	1.5	2.4	2.6	4.9
Aug-04	-3.3	-1.2	-3.7	-2.5	-6.4	-0.4	-2.2
Sep-04	6.7	4.5	3.7	3.2	5.9	3.5	5.1
Oct-04	-7.1	-2.3	-0.2	0.7	0.9	6.1	-4.3
Nov-04	1.5	6.3	3.1	-2.2	7.2	0.3	3.1
Dec-04	12.4	-2.3	-2.3	-1.4	-2.8	2.0	-2.7
Jan-05	-8.4	-4.4	-0.7	-3.7	-4.1	0.6	-4.0

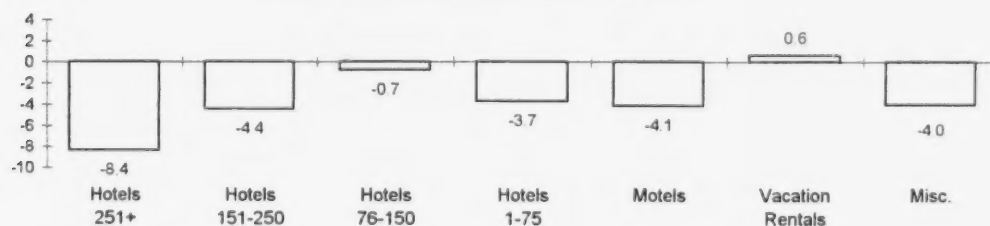
January month-over-month percent growth


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Jan-05	YTD 05	Jan-04	YTD 04	Jan-05	Jan-04	Jan-05	Jan-04
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	6,298	6,298	13.1	13.1	149	11	7,999	197
Total - Hotels	5,283	5,283	12.8	12.8	63	-1	5,436	55
76+ Rooms	4,091	4,091	12.3	12.3	25	0	3,829	128
1-75 Rooms	1,193	1,193	14.8	14.8	38	-1	1,607	-73
Motels	522	522	-3.0	-3.0	27	0	1,036	-14
Vacation Rentals	167	167	9.2	9.2	25	7	350	121
19 Cowichan Valley								
Total - All accommodation types	409	409	16.5	16.5	32	0	634	0
Motels	97	97	-3.4	-3.4	16	1	316	20
21 Nanaimo								
Total - All accommodation types	1,718	1,718	11.6	11.6	64	2	2,553	-121
Total - Hotels	996	996	9.8	9.8	21	0	1,286	-166
Motels	329	329	17.1	17.1	23	2	623	48
Vacation Rentals	332	332	10.3	10.3	16	1	530	1
23 Alberni-Clayoquot								
Total - All accommodation types	1,218	1,218	15.4	15.4	50	-1	1,209	-73
Motels	125	125	57.6	57.6	18	-2	355	-50
Vacation Rentals	453	453	41.3	41.3	13	3	319	49
25 Comox-Strathcona								
Total - All accommodation types	1,239	1,239	-12.9	-12.9	51	2	1,505	16
Motels	321	321	-17.4	-17.4	22	-1	593	-49
Vacation Rentals	135	135	-34.0	-34.0	12	2	162	26
27 Powell River								
Total - All accommodation types	-	-	-	-	15	-1	338	-43
43 Mount Waddington								
Total - All accommodation types	158	158	7.2	7.2	16	0	547	32
45 Central Coast								
Total - All accommodation types	-	-	-	-	5	0	89	0
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	2,001	2,001	-8.8	-8.8	63	0	2,472	-46
Total - Hotels	1,496	1,496	-2.0	-2.0	20	-1	1,380	-50
Motels	319	319	-3.9	-3.9	34	0	907	0
15 Greater Vancouver								
Total - All accommodation types	33,052	33,052	10.8	10.8	227	3	25,553	-70
Total - Hotels	29,871	29,871	5.7	5.7	154	-5	22,452	-768
251+ Rooms	15,694	15,694	6.7	6.7	23	-2	9,392	-564
151-250 Rooms	5,930	5,930	-1.8	-1.8	24	-1	4,529	-223
76-150 Rooms	6,198	6,198	11.5	11.5	53	0	5,823	55
1-75 Rooms	2,049	2,049	4.8	4.8	54	-2	2,708	-36
Motels	859	859	-7.1	-7.1	37	1	1,580	34
Vacation Rentals	2,117	2,117	336.1	336.1	19	4	786	231
29 Sunshine Coast								
Total - All accommodation types	141	141	-16.0	-16.0	15	0	270	-26
31 Squamish-Lillooet								
Total - All accommodation types	25,959	25,959	-5.0	-5.0	99	2	7,464	302
Total - Hotels	20,597	20,597	-5.3	-5.3	44	0	5,625	189
151+ Rooms	14,342	14,342	-0.0	-0.0	11	1	3,429	272
76-150 Rooms	4,783	4,783	-14.1	-14.1	15	0	1,519	0
1-75 Rooms	1,472	1,472	-19.9	-19.9	18	-1	677	-83
Vacation Rentals	3,977	3,977	0.7	0.7	30	3	1,278	76
Miscellaneous	1,280	1,280	-14.6	-14.6	16	-1	344	37
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	1,164	1,164	-3.8	-3.8	84	-2	2,712	-86
Total - Hotels	593	593	-21.3	-21.3	13	-4	965	-208
Motels	290	290	1.0	1.0	59	0	1,508	29

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Jan-05	YTD 05	Jan-04	YTD 04	Jan-05	Jan-04	Jan-05	Jan-04
33 Thompson-Nicola								
Total - All accommodation types	4,085	4,085	6.4	6.4	133	-8	5,161	-101
Total - Hotels	1,479	1,479	-1.7	-1.7	33	-2	2,119	-93
76+ Rooms	1,208	1,208	-2.0	-2.0	12	0	1,388	-1
1-75 Rooms	271	271	-0.5	-0.5	21	-2	731	-92
Motels	677	677	-2.8	-2.8	76	0	2,314	16
Vacation Rentals	1,639	1,639	19.3	19.3	11	-2	452	-13
35 Central Okanagan								
Total - All accommodation types	3,809	3,809	6.6	6.6	59	2	3,660	35
Total - Hotels	2,354	2,354	5.6	5.6	21	0	1,912	0
Motels	374	374	-2.0	-2.0	22	-2	1,049	-48
Vacation Rentals	1,045	1,045	12.9	12.9	12	2	523	46
37 North Okanagan								
Total - All accommodation types	2,008	2,008	5.7	5.7	40	0	1,560	-74
Total - Hotels	1,428	1,428	-1.2	-1.2	14	-1	794	-30
Motels	305	305	37.1	37.1	18	-1	581	-61
39 Columbia-Shuswap								
Total - All accommodation types	2,064	2,064	3.1	3.1	83	-6	2,751	-139
Total - Hotels	771	771	4.0	4.0	16	-2	943	-92
Motels	561	561	9.9	9.9	39	-3	1,371	-91
Miscellaneous	645	645	-5.1	-5.1	24	0	387	49
Kootenay								
01 East Kootenay								
Total - All accommodation types	4,356	4,356	-3.6	-3.6	99	2	4,296	-52
Total - Hotels	1,452	1,452	-0.4	-0.4	23	-2	1,396	-116
Motels	464	464	-13.6	-13.6	40	-2	1,014	-73
Vacation Rentals	1,341	1,341	2.1	2.1	15	2	969	70
03 Central Kootenay								
Total - All accommodation types	916	916	-0.2	-0.2	64	2	1,358	42
Total - Hotels	493	493	-1.5	-1.5	16	2	705	67
Motels	156	156	6.7	6.7	25	0	487	3
Vacation Rentals	67	67	40.5	40.5	11	1	72	6
05 Kootenay Boundary								
Total - All accommodation types	428	428	-2.2	-2.2	32	-1	616	-32
Motels	143	143	-3.8	-3.8	21	0	364	8
Cariboo								
41 Cariboo								
Total - All accommodation types	759	759	-1.6	-1.6	66	1	1,745	79
Motels	449	449	-0.7	-0.7	37	3	1,055	42
Vacation Rentals	15	15	-30.7	-30.7	12	1	161	65
53 Fraser-Fort George								
Total - All accommodation types	1,688	1,688	12.2	12.2	50	1	2,531	99
Total - Hotels	1,247	1,247	13.6	13.6	18	1	1,447	72
Motels	368	368	19.7	19.7	27	0	942	-8
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	295	295	-10.7	-10.7	26	-2	929	-12
Motels	54	54	-31.7	-31.7	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	434	434	-5.7	-5.7	30	5	780	84
Motels	156	156	-4.2	-4.2	17	3	402	65
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	486	486	17.1	17.1	43	4	1,109	28
Motels	274	274	13.4	13.4	25	2	669	36
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	5,918	5,918	33.7	33.7	74	6	3,818	707
Total - Hotels	2,592	2,592	14.0	14.0	23	2	1,579	52
Motels	1,071	1,071	17.2	17.2	32	0	886	-26
Vacation Rentals	2,084	2,084	83.1	83.1	14	2	1,147	562

"-" Data for regions with fewer than 10 properties reporting can not be released

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Jan-05	YTD 05	Jan-04	YTD 04	Jan-05	Jan-04	Jan-05	Jan-04
Vancouver Island/Coast	11,224	11,224	3.1	3.1	382	13	14,874	8
Victoria (C)	5,113	5,113	11.3	11.3	76	4	5,607	255
Other CRD	1,185	1,185	21.9	21.9	73	7	2,362	-58
Nanaimo (C)	1,117	1,117	13.2	13.2	22	1	1,216	20
Port Alberni (C)	241	241	79.3	79.3	12	1	328	-2
Courtenay (C)	494	494	-0.0	-0.0	12	2	483	45
Rest of Development Region	3,074	3,074	-17.1	-17.1	199	0	4,838	-252
Mainland/Southwest	61,153	61,153	2.7	2.7	404	5	35,759	160
Downtown Vancouver (C)	18,049	18,049	5.5	5.5	83	-4	12,662	-458
Other Vancouver (C)	3,140	3,140	135.0	135.0	30	0	2,545	-22
Richmond (C)	6,579	6,579	3.1	3.1	24	1	4,371	50
Burnaby (C)	1,368	1,368	4.2	4.2	11	1	1,357	327
Other GVRD	3,896	3,896	6.0	6.0	79	5	4,618	118
Whistler (DM)	25,450	25,450	-5.1	-5.1	75	1	6,848	265
Rest of Development Region	2,652	2,652	-7.8	-7.8	102	1	3,358	-120
Thompson/Okanagan	13,131	13,131	4.9	4.9	399	-11	15,844	-365
Penticton (C)	681	681	-20.7	-20.7	40	0	1,603	-110
Kamloops (C)	3,448	3,448	6.4	6.4	65	2	3,600	26
Kelowna (C)	3,584	3,584	9.0	9.0	49	3	3,084	57
Vernon (C)	1,972	1,972	5.4	5.4	32	-1	1,427	-83
Revelstoke (C)	879	879	-14.5	-14.5	24	-2	918	-112
Rest of Development Region	2,567	2,567	14.8	14.8	189	-13	5,202	-143
Kootenay	5,700	5,700	-3.0	-3.0	195	3	6,270	-42
Cranbrook (C)	368	368	-6.7	-6.7	16	-1	758	-36
Nelson (C)	341	341	-5.4	-5.4	11	-1	392	-31
Rest of Development Region	4,991	4,991	-2.5	-2.5	179	4	5,512	-6
Cariboo	2,447	2,447	7.5	7.5	116	2	4,276	178
Quesnel (C)	188	188	-4.4	-4.4	13	0	452	0
Williams Lake (C)	247	247	8.3	8.3	11	0	534	0
Prince George (C)	1,354	1,354	18.9	18.9	28	1	1,775	87
Rest of Development Region	658	658	-7.6	-7.6	64	1	1,515	91
North Coast	729	729	-7.8	-7.8	56	3	1,709	72
Prince Rupert (C)	257	257	-5.9	-5.9	15	0	761	0
Terrace (C)	243	243	-19.7	-19.7	11	1	406	33
Rest of Development Region	229	229	6.5	6.5	30	2	542	39
Nechako	486	486	17.1	17.1	43	4	1,109	28
Smithers (T)	220	220	24.0	24.0	13	2	426	33
Rest of Development Region	267	267	12.0	12.0	30	2	683	290
Northeast	5,918	5,918	33.7	33.7	74	6	3,818	767
Dawson Creek (C)	613	613	47.8	47.8	13	0	486	2
Fort St. John (C)	3,086	3,086	5.5	5.5	23	0	1,766	0
Rest of Development Region	2,208	2,208	104.6	104.6	38	6	1,566	705

"-" Data for regions with fewer than 10 properties reporting can not be released

Table 5: Historical Unadjusted Room Revenue by Development Region (\$000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,244	863,427	229,533	76,892	46,162	20,160	8,811	51,889	1,592,118

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	4.1	-1.3	12.2	7.1

Monthly data

Jan-04	10,891	59,523	12,523	5,875	2,278	791	415	4,428	96,722
Feb-04	14,125	68,452	15,086	8,185	2,450	1,033	459	6,323	116,112
Mar-04	17,288	74,357	15,792	7,768	3,224	1,040	507	6,585	126,540
Apr-04	19,495	83,507	12,698	5,004	3,223	1,058	545	3,860	108,186
May-04	25,608	71,530	18,051	4,781	3,831	1,504	652	2,397	128,335
Jun-04	31,380	81,608	21,957	5,917	4,699	2,798	984	3,231	152,583
Jul-04	44,238	98,094	37,609	9,647	5,481	3,434	1,051	3,896	203,450
Aug-04	49,430	101,815	37,115	10,120	6,109	3,253	1,100	4,029	212,971
Sep-04	35,179	81,870	23,602	7,603	5,219	2,387	1,172	4,075	161,087
Oct-04	20,981	55,010	13,961	4,252	3,998	1,251	886	5,132	105,488
Nov-04	13,405	43,212	8,484	2,886	2,858	959	570	4,183	76,555
Dec-04	13,224	64,448	12,859	4,875	2,799	685	489	3,971	103,130
Jan-05	11,224	61,153	13,131	5,700	2,447	729	486	5,918	100,789

Year-over-year percent changes

Jan-04	13.9	-4.4	3.3	8.0	1.1	8.0	-6.0	10.5	-0.1
Feb-04	9.7	-5.5	11.8	12.1	8.4	8.9	-14.0	24.7	1.0
Mar-04	3.8	1.4	7.0	0.3	7.8	-7.2	-15.9	-4.2	2.0
Apr-04	5.9	14.1	8.7	15.2	1.0	5.0	7.0	4.8	10.8
May-04	4.7	11.6	10.5	1.7	1.3	4.3	-2.1	-2.2	8.8
Jun-04	9.0	17.0	2.6	5.0	4.8	6.8	6.0	12.0	11.8
Jul-04	12.4	13.9	14.4	11.6	6.0	10.7	-0.7	3.6	13.0
Aug-04	5.2	0.6	0.2	1.5	9.7	4.7	-3.8	1.3	1.9
Sep-04	11.8	12.8	17.9	14.1	9.3	1.2	7.4	15.2	13.1
Oct-04	5.4	5.2	1.2	0.2	5.9	3.7	-8.0	48.5	5.9
Nov-04	5.1	4.3	5.5	16.2	8.9	6.2	5.9	41.0	6.7
Dec-04	12.4	8.6	8.6	-3.0	27.3	-17.5	3.4	4.4	8.5
Jan-05	3.1	2.7	4.9	-3.0	7.5	-7.8	17.1	33.7	4.2

January year-over-year percent change

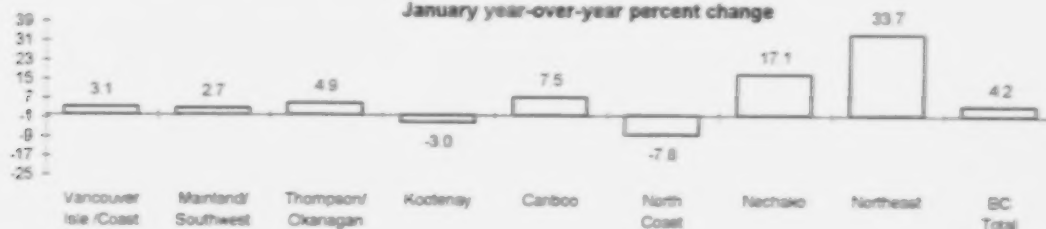


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**

Annual data

2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,970.8	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.8	118.0
2003	7,335.3	6,137.4	2,580.7	3,556.7	1,197.8	577.6	410.1	124.8
2004	7,425.0	6,021.9	2,493.8	3,545.3	1,403.0	715.8	458.1	144.3

Annual percent changes

2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.1	-4.3	-13.8	4.2	-3.0	4.4	-11.7	-10.5
2003	-8.0	-7.0	-8.1	-6.1	-12.9	-24.4	-0.4	5.8
2004	1.2	-1.9	-3.4	-0.3	17.1	23.9	11.7	15.6

Monthly data

Feb-04	600.5	489.7	207.1	288.2	110.8	56.1	36.0	11.1
Mar-04	611.0	504.8	214.1	299.1	106.2	59.2	36.3	9.3
Apr-04	630.5	511.7	212.8	299.7	118.7	63.3	37.0	11.7
May-04	632.3	506.0	209.8	297.4	126.3	65.6	39.3	13.1
Jun-04	638.8	511.9	216.4	294.9	126.9	67.9	39.5	12.9
Jul-04	633.0	510.1	212.4	296.8	122.9	60.1	41.8	12.8
Aug-04	613.0	495.5	203.9	293.0	117.5	56.1	38.8	12.6
Sep-04	647.6	527.8	205.7	303.8	119.8	58.5	40.4	12.7
Oct-04	610.9	492.9	203.0	293.8	118.0	58.8	39.6	11.7
Nov-04	605.6	493.9	201.4	297.2	111.7	56.5	35.9	12.1
Dec-04	607.5	492.8	198.5	291.7	114.7	55.6	39.0	12.2
Jan-05	576.0	461.7	179.8	288.6	114.3	54.2	40.0	12.5
Feb-05	604.6	484.8	198.6	289.4	119.8	60.0	40.0	12.5

Month-over-month growth rates

Feb-04	1.0	1.0	-0.8	-0.5	1.2	-3.4	3.7	-9.0
Mar-04	1.8	3.1	3.4	3.8	-4.1	5.6	0.8	-15.8
Apr-04	3.2	1.4	-0.6	0.2	11.8	6.9	2.1	25.6
May-04	0.3	-1.1	-1.4	-0.8	6.3	3.6	6.1	12.3
Jun-04	1.0	1.2	3.1	-0.8	0.5	3.4	0.5	-2.0
Jul-04	-0.9	-0.3	-1.8	0.6	-3.1	-11.4	5.8	-0.8
Aug-04	-3.2	-2.9	-4.0	-1.3	-4.4	-6.7	-7.2	-1.1
Sep-04	5.6	6.5	0.9	3.7	2.0	4.4	4.3	0.4
Oct-04	-5.7	-6.6	-1.3	-3.3	-1.5	0.4	-2.0	-7.7
Nov-04	-0.9	0.2	-0.8	1.2	-5.4	-3.9	-9.4	3.4
Dec-04	0.3	-0.2	-1.4	-1.9	2.7	-1.6	8.6	0.9
Jan-05	-5.2	-6.3	-9.4	-1.0	-0.3	-2.4	2.6	2.5
Feb-05	5.0	5.0	10.5	0.3	4.8	10.7	-0.2	-0.2

* Seasonally adjusted totals for US and overseas entries are calculated by Statistics Canada, and are adjusted to sum to national totals. Therefore, same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)				Other Transportation (000s)			
	Vancouver				Victoria	BC Ferries		Coquihalla Hwy Passenger Vehicles
	Total	Domestic	Trans-border	Other Int'l.		Vehicles	Passengers	

Annual data

2000	16,033	8,306	4,074	3,652	1,139	7,887	21,280	2,400
2001	15,477	7,868	4,001	3,608	1,158	8,104	21,309	2,461
2002	14,877	7,422	3,855	3,600	1,102	8,272	21,540	2,530
2003	14,322	7,267	3,815	3,241	1,183	8,263	21,348	2,480
2004	15,726	7,986	3,965	3,776	1,250	8,532	21,953	2,586

Annual growth rates

2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.7	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.8	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0
2004	9.8	9.9	3.9	16.5	5.7	3.3	2.8	4.3

Monthly data

Feb-04	1,288	664	328	296	104	705	1,806	211
Mar-04	1,278	650	327	300	102	713	1,841	223
Apr-04	1,305	654	338	314	104	715	1,865	221
May-04	1,318	658	330	329	103	702	1,823	217
Jun-04	1,323	669	323	332	103	703	1,812	213
Jul-04	1,316	671	322	323	104	709	1,821	218
Aug-04	1,303	658	329	317	100	696	1,779	209
Sep-04	1,344	685	339	320	110	712	1,833	221
Oct-04	1,320	670	335	314	104	718	1,851	214
Nov-04	1,340	685	340	315	105	726	1,866	221
Dec-04	1,346	695	337	314	107	749	1,897	216
Jan-05	1,366	711	343	313	109	681	1,721	208
Feb-05	1,353	701	331	321	111	725	1,856	226

Month-over-month growth rates

Feb-04	3.4	5.9	3.5	-2.0	0.4	3.0	2.6	3.8
Mar-04	-0.8	-2.1	-0.2	1.6	-2.2	1.1	1.9	5.6
Apr-04	2.2	0.6	3.2	4.4	2.3	0.3	1.3	-1.0
May-04	1.0	0.7	-2.3	5.1	-1.5	-1.8	-2.2	-1.8
Jun-04	0.4	1.6	-2.2	0.7	0.7	0.2	-0.6	-1.8
Jul-04	-0.5	0.4	-0.2	-2.6	0.8	0.8	0.5	2.3
Aug-04	-1.0	-2.0	2.0	-1.9	-3.7	-1.8	-2.3	-4.1
Sep-04	3.1	4.2	3.1	0.9	9.4	2.3	3.1	5.9
Oct-04	-1.8	-2.2	-1.1	-1.7	-5.2	0.8	1.0	-3.1
Nov-04	1.5	2.2	1.3	0.4	1.0	1.2	0.8	3.0
Dec-04	0.5	1.5	-0.9	-0.4	2.3	3.1	1.7	-2.3
Jan-05	1.5	2.2	1.8	-0.4	1.1	-9.1	-9.3	-3.5
Feb-05	-1.0	-1.3	-3.5	2.6	1.9	6.5	7.8	8.7

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel Industry ²		Consumer Price Index ¹	
	Total tourism related	Air transport ⁴	Accommodation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%) ³	Room Rate (\$)	Traveller accommodation	Restaurant food ⁴

Annual data

2000	188.4	14.8	28.2	116.7	28.8	60.0	114.03	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.13	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	117.00	124.2	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	113.71	111.9	127.6
2004	193.2	13.0	27.6	117.8	34.8	61.6	115.58	102.5	129.9

Annual Growth Rates

2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.7	0.8	-6.9	3.3
2003	1.1	4.4	-0.7	-0.3	6.8	-1.1	-2.8	-9.9	1.8
2004	0.2	2.2	-4.8	0.0	4.2	5.7	1.6	-8.4	1.8

Monthly data

Feb-04	191.1	13.0	27.4	117.1	33.6	58.6	114.50	102.4	129.0
Mar-04	193.7	12.8	27.4	118.3	35.2	61.2	114.10	102.8	129.2
Apr-04	192.7	12.7	27.6	117.8	34.5	62.1	116.30	102.7	129.6
May-04	192.9	12.8	28.4	117.3	34.4	62.1	116.00	102.5	129.8
Jun-04	192.7	13.2	27.5	117.7	34.2	62.6	115.80	102.4	129.9
Jul-04	192.0	13.0	27.6	116.9	34.5	61.8	116.00	102.1	129.9
Aug-04	193.9	13.2	27.3	117.9	35.5	59.7	115.60	100.8	129.7
Sep-04	193.4	13.2	27.6	116.9	35.7	62.4	116.10	101.9	130.0
Oct-04	191.4	13.3	27.4	116.3	34.4	62.1	115.00	102.0	130.3
Nov-04	193.8	13.2	27.2	117.8	35.5	62.8	115.80	103.3	130.6
Dec-04	195.4	13.1	27.5	118.6	36.2	63.5	117.10	103.6	131.8
Jan-05	195.3	13.2	27.7	118.6	35.7	61.3	110.80	104.3	131.6
Feb-05	196.0	13.1	28.2	119.0	35.7	62.8	110.00	103.8	131.9

Month-over-month growth rates

Feb-04	-2.0	2.1	-1.1	-3.0	-0.9	-1.9	-0.2	-1.0	0.2
Mar-04	1.4	-1.8	0.1	1.0	4.9	2.6	-0.3	0.4	0.2
Apr-04	-0.5	-0.2	0.7	-0.4	-1.9	0.9	1.9	-0.1	0.3
May-04	0.1	0.6	2.9	-0.5	-0.3	0.0	-0.3	-0.2	0.2
Jun-04	-0.1	3.1	-3.1	0.4	-0.6	0.5	-0.2	-0.1	0.1
Jul-04	-0.3	-1.5	0.3	-0.7	1.0	-0.8	0.2	-0.3	0.0
Aug-04	1.0	1.5	-1.1	0.8	2.9	-2.1	-0.3	-1.3	-0.2
Sep-04	-0.3	0.2	0.9	-0.8	0.5	2.7	0.4	1.1	0.2
Oct-04	-1.0	0.8	-0.7	-0.5	-3.7	-0.3	-0.9	0.1	0.2
Nov-04	1.2	-0.8	-0.6	1.3	3.4	0.7	0.7	1.3	0.2
Dec-04	0.9	-1.0	1.1	0.7	1.8	0.7	1.1	0.3	0.9
Jan-05	-0.1	1.1	0.6	0.0	-1.4	-2.2	-5.4	0.7	-0.2
Feb-05	0.4	-1.3	1.8	0.3	0.1	1.5	-0.7	-0.5	0.2

¹Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

²Source: Pannell Kerr Forster and BC Stats

³Occupancy Rate change expressed as percentage point change

⁴No identifiable seasonality.

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns ¹					
	Receipts (\$ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services

Annual data

2000	5,079.6	505.6	4,574.1	32,568.0	2,487.5	30,080.5
2001	5,317.2	533.7	4,783.5	33,743.3	2,602.8	31,140.5
2002	5,403.0	546.2	4,856.8	34,527.9	2,610.2	31,917.7
2003	5,654.4	584.9	5,069.5	35,043.2	2,626.9	32,416.4
2004	5,969.2	625.0	5,344.1	36,670.1	2,707.4	33,962.7

Annual growth rates

2000	5.3	5.3	5.2	6.9	4.3	7.2
2001	4.7	5.6	4.6	3.6	4.6	3.5
2002	1.6	2.3	1.5	2.3	0.3	2.5
2003	4.7	7.1	4.4	1.5	0.6	1.6
2004	5.6	6.9	5.4	4.6	3.1	4.8

Monthly data

Feb-04	477	52	425	2,996	228	2,768
Mar-04	491	51	439	3,045	224	2,821
Apr-04	493	51	442	3,038	224	2,814
May-04	495	52	443	3,059	229	2,831
Jun-04	498	53	445	3,055	230	2,825
Jul-04	491	52	438	3,047	233	2,814
Aug-04	497	51	446	3,111	223	2,889
Sep-04	505	52	453	3,069	223	2,847
Oct-04	505	54	452	3,067	226	2,841
Nov-04	529	52	477	3,162	217	2,944
Dec-04	498	52	446	3,030	223	2,806
Jan-05	522	53	469	3,183	227	2,956
Feb-05	533	50	483	3,175	220	2,955

Month-over-month growth rates

Feb-04	-2.7	0.5	-3.0	0.2	0.1	0.2
Mar-04	2.9	-1.1	3.4	1.6	-1.9	1.9
Apr-04	0.5	-0.1	0.6	-0.2	0.2	-0.3
May-04	0.4	1.9	0.2	0.7	2.0	0.6
Jun-04	0.5	1.0	0.4	-0.1	0.8	-0.2
Jul-04	-1.4	-0.9	-1.5	-0.3	1.0	-0.4
Aug-04	1.2	-2.6	1.7	2.1	-4.4	2.7
Sep-04	1.7	1.8	1.6	-1.4	0.0	-1.5
Oct-04	0.1	3.7	-0.3	-0.1	1.2	-0.2
Nov-04	4.6	-2.9	5.5	3.1	-3.6	3.6
Dec-04	-5.8	-0.1	-6.4	-4.2	2.7	-4.7
Jan-05	4.7	0.8	5.2	5.1	1.6	5.1
Feb-05	2.0	-5.2	2.9	-0.3	-3.1	-0.1

¹Source: Statistics Canada & BC Stats.

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Tourism Sector Monitor ♦ May 2005

Room Revenue

Room revenues edged up in February (+0.7%, *seasonally adjusted*), following a decline in the previous month. Five regions posted growth, which was especially prominent in Nechako (+23.2%) and Northeast (+14.3%). The sharp increase in revenues in Nechako is largely due to filming activities in the Smithers area, while work camps in the Northeast continued to boost revenues in the region.

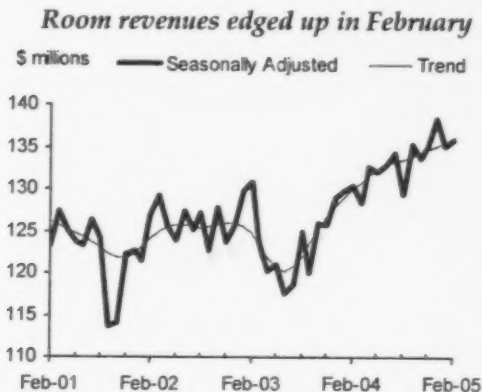


Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type			
	Feb 05 (\$000)	Jan 05 (\$000)	% change
Total	135,963	135,054	+0.7
Hotels	98,311	97,398	+0.9
Motels	17,259	16,470	+4.8
Other Acc.	19,170	19,579	-2.1
Regions (Top 3 performers)			
Nechako	1,026	833	+23.2
Northeast	5,925	5,182	+14.3
Cariboo	4,198	3,892	+7.9

Revenues were down for the second consecutive month in the two largest development regions, Mainland/Southwest (-1.1%) and Vancouver/Island (-1.6%). Revenues rose in Cariboo (+7.9%), Thompson-Okanagan (+4.8%) and North Coast (+4.1%) in February.

Very large hotels (251+ rooms, -1.4%) and vacation rentals (-4.0%) experienced slow business in February. Revenues increased at all the other accommodations following two months of decline. Motels (+4.8%) and smaller hotels (+4.7%) posted substantial gains, while large hotels (151-250 rooms, +2.1%) and hotels (76-150 rooms, +1.6%) helped further boost overall room revenues.

Visitor Entries

The volume of travellers entering Canada via BC borders bounced back (+4.4%, *seasonally adjusted*) in February. This was mostly due to a significant jump in Asian (+11.4%) entries and same-day visits from the US (+10.7%). The US overnight (-0.1%) market was the only area to experience a slowdown in the number of travellers in February.

BC's top four Asian markets performed exceptionally well in February. There was substantial growth in the number of visitors from Taiwan (+57.2%) and Hong Kong (+32.4%), and continued growth from Japanese (+5.3%) and South Korean (+4.4%) markets.

Entries from Europe inched up (+0.2%), while the number of visitors from Australia, New Zealand and South Pacific increased (+1.0%) in February.

Canadian travel abroad increased (+4.4%) as more Canadians made same-day trips to

the US (+6.0%), but fewer travelled to other destinations (-0.4%).

Visitor entries increases in February

Visitor entries (thousands)

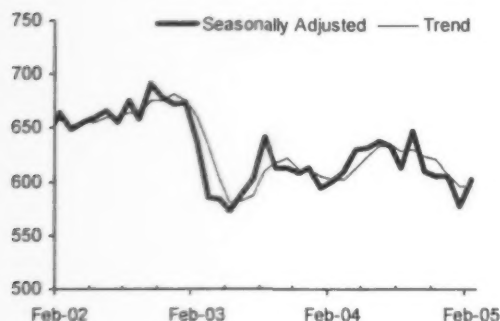


Table 2. Traveller Entries
(seasonally adjusted)

	Feb-05 (⁰⁰⁰)	Jan-05 (⁰⁰⁰)	% chg from Jan-05
American visitors			
Total	483	463	4.2
Same-day	199	180	10.7
Overnight	286	287	-0.1
Overseas visitors			
Total	120	115	5.0
Europe	40	40	0.2
UK	20	19	4.9
Asia	61	55	11.4
Japan	19	18	5.3
Taiwan	9	6	57.2
Oceania	12	12	1.0

Note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Other Indicators

In the hotel industry, hotel occupancy increased 1.9 percentage points while average room rates edged down (-0.7%) in February.

Employment in key tourism-related industries crept up (+0.4%). The air transport sector (-1.2%) experienced job losses which were offset by an increase in the accommodation industry (+2.0%). There were modest job gains in the food & beverage services (0.2%) and arts, entertainment & recreation (+0.4%) sector.

The Consumer Price Index for traveller accommodation edged down (-0.6%), while the cost of restaurant food (+0.2%) advanced marginally in January.

Transportation indicators were mixed in February. The number of passengers at the Vancouver airport decreased (-0.8%). Both domestic (-1.1%) and trans-border (-3.4%) traffic was down, while passenger entries from other international destinations increased (+2.6%). Traffic at the Victoria airport rose (+2.2%) in February.

After a month of relatively weak passenger vehicle traffic, the number of cars on the Coquihalla Highway increased sharply (+10.3%). Passenger volume (+7.9%) and vehicles (+6.4%) aboard BC Ferries were also up.

Restaurant, caterer and tavern receipts posted significant gains in February (+5.9%, *seasonally adjusted*), as food services (+7.1%) offset the decline in drinking places (-4.8%) receipts.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Feb-05	Change from Jan-05
Hotel Industry		
Occupancy rate	63.2	1.9 pp.
Average room charge (Pannell Kerr Forster)	110.00	-0.7%
Airport Passengers (000s) (%)		
Vancouver International Airport		
Total traffic	1,357	-0.8
US (trans-border)	333	-3.4
Other International	321	2.6
Canada (domestic) (YVR)	703	-1.1
Victoria International Airport		
Total traffic (Victoria Airport Authority)	111	2.2
Restaurant Receipts (\$ millions) (%)		
All establishments	552	5.9
Food service	502	7.1
Drinking places (Statistics Canada)	50	-4.8
Transportation (000s) (%)		
Coquihalla Highway		
Passenger Vehicles (Ministry of Transportation & Highways)	227	10.3
BC Ferries		
Vehicle Volume	726	6.4
Passenger Volume (BC Ferries)	1,857	7.9
Exchange Rates Cdn \$		
US \$	0.807	-0.01
UK Pound	0.427	-0.01
Japanese Yen	84.688	0.36
Australian \$ (Statistics Canada)	1.032	-0.03

Note: pp. percentage points

Note to readers: all data in the *Tourism Sector Monitor* are reported on a seasonally adjusted basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues rose (+1.3%, *seasonally adjusted*) in March as four regions posted month-over-month gains. The three biggest development regions, Mainland/Southwest (+1.5%), Vancouver Island/Coast (+4.1%) and Thompson/ Okanagan (+2.2%), posted increases in room revenue in March. Driving the growth was revenues at smaller hotels (1-75 rooms, +6.5%), very large hotels (251+ rooms, +3.4%) and motels (+2.1%). Vacation rentals (-2.1%) and other non-

standard accommodation types—bed and breakfast, work camps and resorts—experienced a weak month (-2.0%). Revenues generated by large hotels (151-250 rooms, +0.0%) were virtually unchanged.

Visitor entries dropped in March (-1.7%, *seasonally adjusted*). This was largely due to fewer entries from the US (-2.1%). Entries from overseas were flat.

Transportation indicators were up at both Vancouver (+1.9%) and Victoria (+2.8%) airport. There were fewer passengers (-0.6%) and vehicles (-0.3%) aboard BC Ferries.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

Special Focus: European travellers to Canada

Over the years Canada has been successful in attracting a fairly stable segment of European long-haul travellers. Canada's varied natural environment, multicultural heritage and the local character of its cities provide diverse experiences for visitors to the country.

Travel from Europe to Canada is increasing

The latest research conducted by the Canadian Tourism Commission (CTC) indicates that Canada is perceived as a favoured destination by important European long-haul markets such as the UK, France and Germany. Europeans are just as aware of Canada as they are of Spain, which is currently a very popular tourism destination. The research also indicated that Canada compares favourably with the US, which is one of Canada's competitors in the long-haul market.

European travel to BC bounced back in 2004

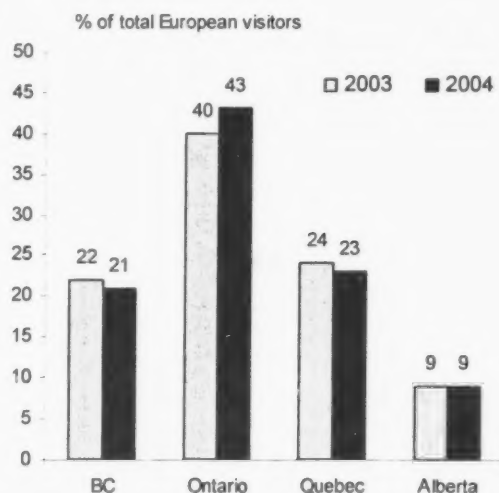


Data Source: Statistics Canada

In 2004, Canada welcomed over 2.2 million Europeans, up 19% from the previous year. This points to a strong recovery from a downward trend experienced since 2000.

European visitors travelled to Canada in record numbers in 2000 (up 4.9% from 1999) reaching close to 2.5 million visitors, but experienced significant declines thereafter, until last year. The downturn was exacerbated by the events of 9/11 and the following safety, security and health concerns resulted in a setback in overnight trips from Europe. The recent economic recovery has boosted consumer confidence in European markets, resulting in increased demand for travel and tourism to Canada.

More European travellers enter Canada via Ontario



Data Source: Statistics Canada

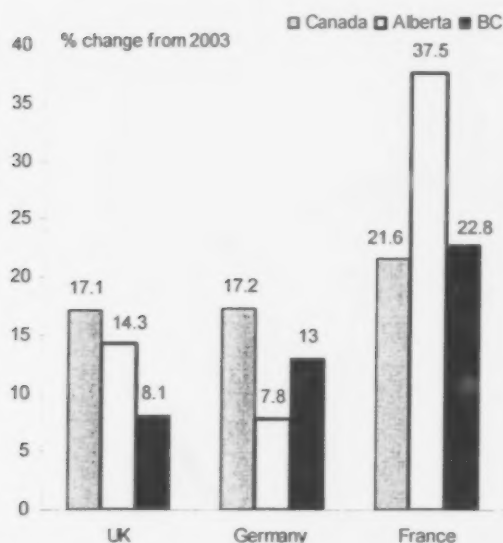
Close to half of the visitors from the UK chose Ontario as their point of entry to Canada in 2004, while BC received 26% and Alberta 13%. Quebec (9%) was the least likely entry point for UK residents out of the four provinces, which together receive

96% of all European travellers. However, Quebec is the most popular destination among French visitors, capturing close to 70% of the travellers from that country.

Significant growth in the number of Europeans travelling to Canada and BC in 2004

The three most important European markets in Canada—the UK, Germany and France—experienced double-digit growth in 2004. These markets represent 68% of the total number of European visitors to Canada. In 2004, more than 846,000 UK travellers visited Canada, out of which more than 222,000, or 26% entered directly via BC.

Double digit-growth in the three most important European markets



Data Source: Statistics Canada

The number of UK visitors to BC grew at a slower pace (+8.1%) in 2004 compared to Alberta (+14.3%) and Canada (+17.1%). However the increase was welcomed by BC's tourist operators since this was the first large gain since 2000, when entries rose 11.6%. While in BC, tourists from the UK like to spend their time visiting friends and

relatives and participating in outdoor activities and sightseeing.

For BC, the second most important European market after the UK is Germany. In 2004, over 318,000 trips were made from Germany to Canada of which 27% were via BC. Overall, this market has traditionally provided a high number of outbound travellers. Statistics from the World Tourism Organization show Germany consistently tops the charts for outbound travel as well as tourism spending, second only to the US.

Travellers from Germany visit BC to experience nature and an unspoiled environment and to have new social and educational experiences. According to the German Federal Bank, Germans spend close to 4% of their disposable income on travel abroad and place a higher priority on holiday travel than on most consumer durables. They also enjoy about six weeks of annual holidays.

BC's third most important European market is France. For Canadian tourism, the German market is usually about the same size as the one from France. Last year was an exception, with the French market outperforming Germany's. In 2004, there were over 341,000 person-trips taken by French travellers to Canada, a 21.6% increase from the previous year. BC also experienced a significant increase (+22.8%) in the number of person-trips from France in 2004. However Alberta outperformed BC (37.5%) in the number of person-trips from France.

Canada's competitors in the European long-haul market

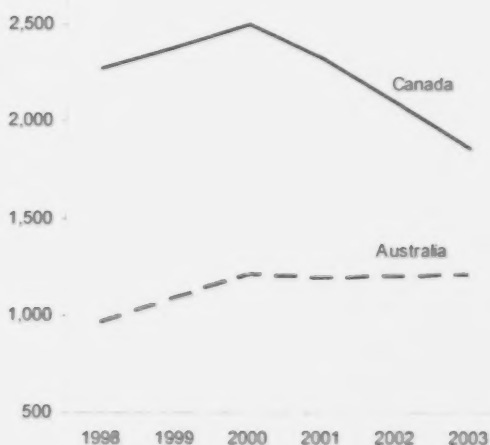
The US receives approximately four times more European visitors than Canada. Canada places second ahead of Mexico in North America as a destination visited by tourists from European countries. In 2002, the World Tourism Organization reported that close to 480,000 tourists from Europe spent their holidays in Mexico. Although the US

is Canada's competition, the close proximity of the two countries helps Canada attract tourists from Europe who are interested in combining trips to both places. Over half of the travellers visiting the US from Europe are from the UK and Germany.

Canada's next direct competitor, Australia, has been experiencing steady growth in the number of travellers from Europe. In 2003, Australia received 1.2 million visitors, mostly from the UK, Germany and Scandinavia. Although Australia's national parks and abundant wildlife are a big drawing card for European travellers, Canada still attracts a higher number of visitors from Europe. This could partly be attributed to lower transportation costs and travel times from Europe to Canada versus Australia. Canada welcomed over 280,000 tourists from France, while Australia recorded only close to 50,000 in 2003.

Europeans choose Canada over Australia as a tourist destination

3,000 Entries from Europe ('000000)



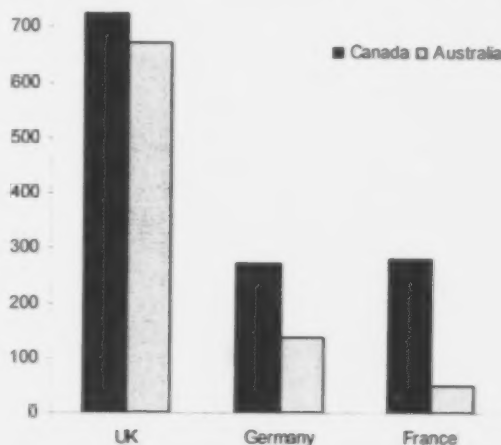
Data Source: World Tourism Organization

The number of travellers from France sharply increased (+21.6%) to over 341,000 visitors in 2004. Not surprisingly, the

French prefer Canada as a tourist destination over Australia due to cultural similarities as well as a common language in Quebec. Canada also attracts more German tourists than Australia. Germans place Canada third on their wish list amongst long-haul destinations.

More visitors from France choose Canada over Australia

800 Non-resident tourists at national borders in 2003 ('000)



Data Source: Statistics Canada and the Australian Bureau of Statistics

Canada enjoys a well-developed position in the European long haul market, but there are certain challenges that need to be addressed in order to capture a bigger slice of the market.

Although Europeans consider Canada a favourite destination, and a high number would like to visit, substantially less end up turning their travel intention into actual visits. Many Europeans do not see their dream of visiting Canada materialize mostly due to the high costs of transportation, but also because of fierce competition from other long-haul destinations that spend more marketing dollars. Australia is expecting to spend close to \$200 million dollars next year in an effort to attract a higher number of foreign tourists, while Canada has only \$79

million at its disposal. Canada is also viewed by some European tourists as a once-in-a-lifetime experience, so repeat travellers are not as common to Canada as to other tourist destinations.

However, there is good potential to attract more tourists from European countries. CTC's efforts in introducing the new "Canada. Keep Exploring" brand is expected to generate about \$63.5 billion from the current \$56 billion revenue, over the next five years. It is hoped that the new branding will encourage and inspire travellers to explore more and create their own adventures in Canada.

Table 1: Room Revenue by Development Region (\$000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,244	863,427	229,533	76,892	46,162	20,160	8,811	51,889	1,592,118

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	4.1	-1.3	12.2	7.1

Monthly data

Feb-04	24,176	70,570	18,717	7,000	3,630	1,672	703	4,052	130,422
Mar-04	23,816	69,090	19,064	6,256	3,825	1,599	621	4,139	128,409
Apr-04	23,958	73,203	18,684	6,630	3,630	1,702	799	4,027	132,633
May-04	23,755	73,131	19,110	6,167	3,643	1,647	733	3,757	131,943
Jun-04	24,315	73,466	18,780	6,279	3,769	1,702	746	3,836	132,894
Jul-04	24,561	73,459	19,246	6,515	3,778	1,750	737	4,156	134,202
Aug-04	24,476	69,923	18,589	6,167	3,834	1,716	722	3,998	129,427
Sep-04	25,123	73,926	19,181	6,458	3,814	1,668	767	4,433	135,370
Oct-04	24,650	71,683	19,123	6,273	3,916	1,701	730	5,551	133,628
Nov-04	25,181	71,915	19,875	6,490	3,958	1,737	759	5,135	135,050
Dec-04	26,268	73,708	20,062	6,234	4,740	1,537	778	4,955	138,283
Jan-05	25,891	71,379	20,080	6,182	3,892	1,614	833	5,182	135,054
Feb-05	25,480	70,586	21,043	6,024	4,198	1,681	1,026	5,925	135,963

Month-over-month growth rates

Feb-04	-3.9	1.8	-2.0	9.0	0.1	-3.2	-1.5	5.3	0.4
Mar-04	-1.1	-2.1	1.9	-10.6	5.4	-4.4	-11.8	2.1	-1.5
Apr-04	0.6	6.0	-2.0	6.0	-5.1	6.5	28.8	-2.7	3.3
May-04	-0.8	-0.1	2.3	-7.0	0.3	-3.2	-8.3	-6.7	-0.5
Jun-04	2.4	0.5	-1.7	1.8	3.5	3.3	1.8	2.1	0.7
Jul-04	1.0	0.0	2.5	3.8	0.2	2.8	-1.3	8.3	1.0
Aug-04	-0.3	-4.8	-3.4	-5.3	1.5	-1.9	-2.0	-3.8	-3.6
Sep-04	2.6	5.7	3.2	4.7	-0.5	-2.8	6.2	10.9	4.6
Oct-04	-1.9	-3.0	-0.3	-2.9	2.7	2.0	-4.8	25.2	-1.3
Nov-04	2.2	0.3	3.9	3.4	1.1	2.1	3.9	-7.5	1.1
Dec-04	4.3	2.5	0.9	-3.9	19.8	-11.5	2.5	-3.5	2.4
Jan-05	-1.4	-3.2	0.1	-0.8	-17.9	5.0	7.1	4.6	-2.3
Feb-05	-1.6	-1.1	4.8	-2.6	7.9	4.1	23.2	14.3	0.7

February month-over-month percent growth

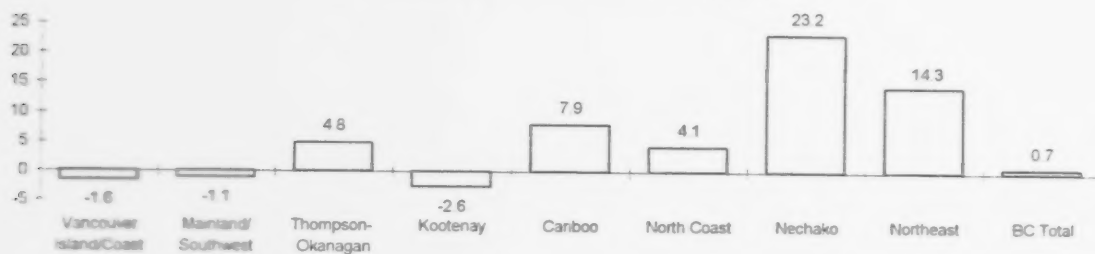


Table 2: Room Revenue by Accommodation Type (\$000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			

Annual data

2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423
2004	467,820	198,608	321,679	185,692	195,026	124,420	98,872

Annual growth rates

2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
2004	6.8	9.8	8.2	6.6	7.5	4.1	3.6

Monthly data

Feb-04	37,343	15,667	25,906	14,824	15,647	9,939	8,244
Mar-04	38,683	16,235	26,221	14,959	15,946	9,141	7,466
Apr-04	40,105	15,779	26,735	15,369	15,884	9,933	7,964
May-04	40,244	16,435	26,872	15,409	15,886	10,152	7,972
Jun-04	40,142	16,707	26,925	15,575	16,092	10,132	8,092
Jul-04	38,964	16,544	27,142	15,805	16,480	10,406	8,485
Aug-04	37,691	16,343	26,242	15,410	15,443	10,364	8,293
Sep-04	40,202	17,075	27,120	15,915	16,342	10,716	8,715
Oct-04	37,318	16,678	27,063	16,035	16,511	11,365	8,333
Nov-04	37,869	17,745	27,976	15,682	17,691	11,364	8,580
Dec-04	42,695	17,321	27,280	15,470	17,214	11,547	8,335
Jan-05	38,875	16,554	27,094	14,876	16,470	11,596	7,983
Feb-05	38,314	16,895	27,523	15,579	17,259	11,137	8,034

Month-over-month growth rates

Feb-04	2.1	-2.6	-1.1	-2.7	-1.5	6.2	-1.8
Mar-04	3.6	3.6	1.2	0.9	1.9	-8.0	-9.4
Apr-04	3.7	-2.8	2.0	2.7	-0.4	8.7	6.7
May-04	0.3	4.2	0.5	0.3	0.0	2.2	0.1
Jun-04	-0.3	1.7	0.2	1.1	1.3	-0.2	1.5
Jul-04	-2.9	-1.0	0.8	1.5	2.4	2.7	4.9
Aug-04	-3.3	-1.2	-3.3	-2.5	-6.3	-0.4	-2.3
Sep-04	6.7	4.5	3.3	3.3	5.8	3.4	5.1
Oct-04	-7.2	-2.3	-0.2	0.8	1.0	6.1	-4.4
Nov-04	1.5	6.4	3.4	-2.2	7.1	0.0	3.0
Dec-04	12.7	-2.4	-2.5	-1.4	-2.7	1.6	-2.9
Jan-05	-8.9	-4.4	-0.7	-3.8	-4.3	0.4	-4.2
Feb-05	-1.4	2.1	1.6	4.7	4.8	-4.0	0.6

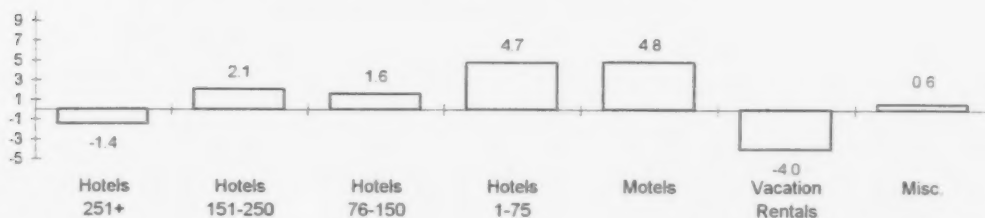
February month-over-month percent growth


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Feb-05	YTD 05	Feb-04	YTD 04	Feb-05	Feb-04	Feb-05	Feb-04
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	8,267	14,565	3.7	7.6	150	7	8,114	275
Total - Hotels	7,015	12,298	2.2	6.5	64	0	5,516	207
76+ Rooms	5,421	9,512	1.5	5.9	26	1	3,937	236
1-75 Rooms	1,593	2,786	4.4	8.6	38	-1	1,579	-29
Motels	665	1,187	1.2	-0.7	29	-1	1,070	-47
Vacation Rentals	186	353	9.6	9.4	23	3	351	65
19 Cowichan Valley								
Total - All accommodation types	560	968	29.6	23.7	33	0	642	0
Motels	142	239	28.7	13.4	17	1	324	20
21 Nanaimo								
Total - All accommodation types	2,125	3,842	2.9	6.6	64	0	2,515	-168
Total - Hotels	1,186	2,181	0.5	4.5	20	-1	1,244	-208
Motels	425	754	14.4	15.6	22	1	614	39
Vacation Rentals	432	764	-2.3	2.8	15	-1	529	-5
23 Alberni-Clayoquot								
Total - All accommodation types	1,835	3,053	13.8	14.4	51	2	1,354	39
Motels	158	282	23.4	36.5	20	1	405	5
Vacation Rentals	737	1,190	36.2	38.1	13	2	326	50
25 Comox-Strathcona								
Total - All accommodation types	1,256	2,495	-24.7	-19.2	51	1	1,511	4
Motels	379	700	-17.3	-17.3	21	-2	587	-55
Vacation Rentals	73	208	-70.8	-54.3	12	2	168	20
27 Powell River								
Total - All accommodation types	-	-	-	-	16	-1	362	-32
43 Mount Waddington								
Total - All accommodation types	181	340	-1.4	2.4	16	1	547	20
45 Central Coast								
Total - All accommodation types	-	-	-	-	6	1	108	19
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	2,465	4,466	-1.1	-4.7	66	1	2,491	-52
Total - Hotels	1,881	3,377	3.6	1.0	19	-2	1,362	-68
Motels	430	748	30.2	13.1	36	0	923	0
15 Greater Vancouver								
Total - All accommodation types	37,623	70,761	7.6	9.2	231	0	26,024	376
Total - Hotels	35,014	64,971	5.0	5.5	159	0	22,959	-239
251+ Rooms	18,974	34,667	6.0	6.3	24	-1	9,678	-278
151-250 Rooms	6,878	12,808	3.7	1.1	25	0	4,752	0
76-150 Rooms	7,038	13,321	6.2	9.3	53	0	5,764	15
1-75 Rooms	2,124	4,176	-1.7	1.5	57	1	2,765	24
Motels	984	1,843	15.4	3.7	38	-1	1,627	41
Vacation Rentals	1,250	3,367	158.4	247.4	16	1	702	161
29 Sunshine Coast								
Total - All accommodation types	188	330	3.7	-5.8	18	-3	317	-64
31 Squamish-Lillooet								
Total - All accommodation types	27,666	53,625	-10.2	-7.7	98	3	7,516	418
Total - Hotels	21,959	42,556	-9.7	-7.7	46	2	5,765	329
151+ Rooms	14,945	29,288	-7.5	-4.0	11	1	3,429	272
76-150 Rooms	5,490	10,273	-10.2	-12.1	16	1	1,604	85
1-75 Rooms	1,524	2,995	-25.7	-23.0	19	0	732	-28
Vacation Rentals	4,281	8,258	-10.3	-5.3	29	1	1,250	37
Miscellaneous	1,341	2,621	-16.3	-15.5	16	0	332	52
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	1,309	2,474	6.0	1.2	86	-2	2,752	-50
Total - Hotels	674	1,267	-15.8	-18.5	14	-3	1,015	-158
Motels	329	619	14.9	7.9	56	-2	1,448	-1

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Feb-05	YTD 05	Feb-04	YTD 04	Feb-05	Feb-04	Feb-05	Feb-04
33 Thompson-Nicola								
Total - All accommodation types	5,150	9,236	4.6	5.4	133	-8	5,260	-76
Total - Hotels	1,912	3,390	5.4	2.2	35	0	2,264	-5
76+ Rooms	1,568	2,776	5.0	1.9	12	0	1,388	-1
1-75 Rooms	343	614	7.4	3.7	23	0	876	-4
Motels	738	1,415	2.7	0.0	74	1	2,262	13
Miscellaneous	425	711	35.7	24.3	13	-2	277	-40
35 Central Okanagan								
Total - All accommodation types	4,938	8,747	12.8	10.0	58	-1	3,500	-188
Total - Hotels	3,033	5,387	14.1	10.2	22	1	1,916	4
76+ Rooms	2,389	4,256	14.2	8.0	11	0	1,477	0
1-75 Rooms	644	1,131	13.8	19.7	11	1	439	4
Motels	483	857	-3.1	-2.6	22	-2	1,051	-58
Vacation Rentals	1,402	2,447	16.8	15.1	11	-1	369	-159
37 North Okanagan								
Total - All accommodation types	2,390	4,398	14.3	10.2	38	-2	1,549	-76
Total - Hotels	1,689	3,116	23.3	10.7	14	0	806	0
Motels	306	610	5.3	19.1	17	-2	567	-75
39 Columbia-Shuswap								
Total - All accommodation types	2,697	4,762	9.8	6.8	89	-4	2,908	-47
Total - Hotels	924	1,695	2.8	3.3	18	0	1,032	-1
Motels	681	1,242	-2.5	2.7	40	-4	1,377	-106
Miscellaneous	892	1,537	19.1	7.6	25	0	417	56
Kootenay								
01 East Kootenay								
Total - All accommodation types	5,422	9,778	-15.6	-10.7	105	3	4,271	-163
Total - Hotels	2,138	3,590	7.5	4.1	27	1	1,544	13
Motels	613	1,077	-11.0	-12.2	44	-1	1,105	-17
Vacation Rentals	1,501	2,842	-30.7	-18.3	14	0	963	46
03 Central Kootenay								
Total - All accommodation types	1,120	2,036	-1.6	-0.9	67	-2	1,411	69
Total - Hotels	626	1,118	7.5	3.3	17	3	738	100
Motels	273	429	8.7	8.0	26	-1	504	28
05 Kootenay Boundary								
Total - All accommodation types	528	956	-15.2	-9.8	34	-1	665	-9
Motels	175	317	-19.7	-13.3	22	-1	373	-9
Cariboo								
41 Cariboo								
Total - All accommodation types	814	1,572	7.3	2.8	63	0	1,687	51
Motels	484	932	13.0	6.0	34	0	1,000	-1
Vacation Rentals	13	29	3.8	-18.1	12	2	161	72
53 Fraser-Fort George								
Total - All accommodation types	2,016	3,704	19.2	15.9	51	1	2,505	31
Total - Hotels	1,514	2,762	19.5	16.8	19	0	1,462	55
Motels	407	775	20.1	19.9	28	0	961	-8
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	532	826	-3.0	-5.9	26	-1	929	-6
Motels	144	198	-4.0	-13.6	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	495	930	2.2	-1.7	27	3	747	67
Motels	172	328	0.0	-2.0	16	2	387	56
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	666	1,152	45.0	31.7	39	1	1,087	13
Motels	321	595	22.1	17.9	25	1	669	30
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	9,235	15,153	46.0	40.9	72	4	3,730	112
Total - Hotels	2,768	5,358	9.6	11.7	23	2	1,579	52
Motels	1,190	2,261	19.4	18.4	32	1	886	-17
Vacation Rentals	4,937	7,021	85.5	84.6	12	-1	1,059	-42

"-" Data for regions with fewer than 10 properties reporting can not be released.

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Feb-05	YTD 05	Feb-04	YTD 04	Feb-05	Feb-04	Feb-05	Feb-04
Vancouver Island/Coast	14,441	25,665	2.2	2.6	387	11	15,153	157
Victoria (C)	6,801	11,914	2.5	6.1	75	4	5,632	334
Other CRD	1,021	1,851	-23.4	-19.7	66	-6	2,160	-381
Nanaimo (C)	1,320	2,437	5.8	9.1	21	0	1,207	11
Port Alberni (C)	246	487	22.5	45.3	12	1	328	-2
Courtenay (C)	497	991	-16.8	-9.2	12	2	493	45
Rest of Development Region	4,557	7,985	10.9	2.2	213	12	5,333	150
Mainland/Southwest	67,943	129,182	-0.7	0.9	413	1	36,348	678
Downtown Vancouver (C)	22,793	40,930	9.1	7.7	83	-1	12,787	-144
Other Vancouver (C)	2,682	5,822	32.9	73.6	33	0	2,842	144
Richmond (C)	6,202	12,780	-6.0	-1.5	24	1	4,371	50
Burnaby (C)	1,612	3,000	9.2	6.8	11	1	1,357	329
Other GVRD	4,334	8,230	8.9	7.5	80	-1	4,667	84
Whistler (DM)	26,806	52,256	-11.5	-8.5	76	1	6,859	273
Rest of Development Region	3,513	6,165	9.8	1.5	106	0	3,465	-58
Thompson/Okanagan	16,484	29,616	9.3	7.3	404	-15	15,969	-437
Penticton (C)	841	1,522	-3.5	-12.0	38	0	1,593	-80
Kamloops (C)	4,380	7,829	3.1	4.5	67	2	3,700	51
Kelowna (C)	4,767	8,350	12.9	11.2	48	-1	3,063	-55
Vernon (C)	2,373	4,346	14.7	10.3	33	0	1,457	-53
Revelstoke (C)	1,230	2,109	9.8	-1.8	24	-2	975	-53
Rest of Development Region	2,892	5,460	13.2	14.0	194	-14	5,181	-247
Kootenay	7,069	12,769	-13.6	-9.2	206	0	6,347	-103
Cranbrook (C)	461	828	6.7	0.3	17	0	794	0
Nelson (C)	416	757	-14.8	-10.8	12	0	425	35
Rest of Development Region	6,193	11,184	-14.8	-9.7	189	0	5,553	-103
Cariboo	2,830	5,277	15.5	11.7	114	1	4,192	82
Quesnel (C)	191	379	-2.8	-3.6	12	0	427	0
Williams Lake (C)	290	538	33.1	20.4	11	0	534	0
Prince George (C)	1,565	2,918	20.7	19.8	28	1	1,775	87
Rest of Development Region	784	1,441	6.1	-0.6	63	0	1,456	-5
North Coast	1,027	1,756	-0.6	-3.7	53	2	1,676	61
Prince Rupert (C)	473	730	-2.8	-3.9	15	0	761	0
Terrace (C)	302	545	-	-	10	1	396	33
Rest of Development Region	252	481	-	-	28	1	519	28
Nechako	666	1,152	45.0	31.7	39	1	1,087	13
Smithers (T)	406	626	78.0	54.4	12	1	419	26
Rest of Development Region	260	526	12.4	12.2	27	0	668	275
Northeast	9,235	15,153	46.0	40.9	72	4	3,730	112
Dawson Creek (C)	828	1,441	44.2	45.7	13	0	471	-13
Fort St. John (C)	5,402	8,498	2.9	3.8	22	0	1,757	0
Rest of Development Region	3,005	5,214	504.4	230.7	37	4	1,502	125

"-" Data for regions with fewer than 10 properties reporting can not be released

Table 5: Historical Unadjusted Room Revenue by Development Region (\$000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,244	863,427	229,533	76,892	46,162	20,160	8,811	51,889	1,592,118

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	4.1	-1.3	12.2	7.1

Monthly data

Feb-04	14,125	68,452	15,086	8,185	2,450	1,033	459	6,323	116,112
Mar-04	17,288	74,357	15,792	7,768	3,224	1,040	507	6,565	126,540
Apr-04	19,495	63,507	12,696	5,004	3,223	1,056	545	3,660	109,186
May-04	25,608	71,530	18,051	4,761	3,831	1,504	652	2,397	128,335
Jun-04	31,380	81,609	21,957	5,917	4,699	2,786	984	3,231	152,563
Jul-04	44,238	98,094	37,609	9,647	5,481	3,434	1,051	3,896	203,450
Aug-04	49,430	101,815	37,115	10,120	6,109	3,253	1,100	4,029	212,971
Sep-04	35,179	81,870	23,602	7,603	5,219	2,367	1,172	4,075	161,087
Oct-04	20,981	55,010	13,961	4,252	3,996	1,251	886	5,132	105,468
Nov-04	13,405	43,212	8,484	2,886	2,856	959	570	4,183	76,555
Dec-04	13,224	64,448	12,659	4,875	2,799	685	469	3,971	103,130
Jan-05	11,224	61,240	13,132	5,700	2,447	729	486	5,918	100,876
Feb-05	14,441	67,943	16,484	7,069	2,830	1,027	666	9,235	119,695

Year-over-year percent changes

Feb-04	9.7	-5.5	11.6	12.1	8.4	6.9	-14.0	24.7	1.0
Mar-04	3.8	1.4	7.0	0.3	7.8	-7.2	-15.9	-4.2	2.0
Apr-04	5.9	14.1	6.7	15.2	1.0	5.0	7.0	4.8	10.8
May-04	4.7	11.6	10.5	1.7	1.3	4.3	-2.1	-2.2	8.8
Jun-04	9.0	17.0	2.6	5.0	4.6	6.8	6.0	12.0	11.8
Jul-04	12.4	13.9	14.4	11.6	6.0	10.7	-0.7	3.6	13.0
Aug-04	5.2	0.6	0.2	1.5	9.7	4.7	-3.6	1.3	1.9
Sep-04	11.8	12.8	17.9	14.1	9.3	1.2	7.4	15.2	13.1
Oct-04	5.4	5.2	1.2	0.2	5.9	3.7	-8.0	48.5	5.9
Nov-04	5.1	4.3	5.5	16.2	8.9	6.2	5.9	41.0	6.7
Dec-04	12.4	8.6	8.6	-3.0	27.3	-17.5	3.4	4.4	8.5
Jan-05	3.1	2.9	4.9	-3.0	7.5	-7.8	17.1	33.7	4.3
Feb-05	2.2	-0.7	9.3	-13.6	15.5	-0.6	45.0	46.0	3.1

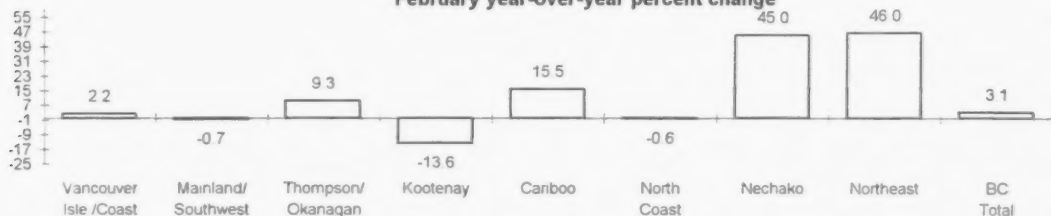
February year-over-year percent change


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**
Annual data								
2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,970.8	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.8	118.0
2003	7,335.3	6,137.4	2,580.7	3,556.7	1,197.8	577.6	410.1	124.8
2004	7,423.8	6,020.6	2,493.8	3,545.3	1,403.2	715.8	458.1	144.3
Annual percent changes								
2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.1	-4.3	-13.8	4.2	-3.0	4.4	-11.7	-10.5
2003	-8.0	-7.0	-8.1	-6.1	-12.9	-24.4	-0.4	5.8
2004	1.2	-1.9	-3.4	-0.3	17.1	23.9	11.7	15.6
Monthly data								
Mar-04	611.0	504.8	212.4	302.0	106.2	58.5	35.8	10.3
Apr-04	630.5	511.7	212.9	300.5	118.7	63.3	36.8	11.6
May-04	632.3	506.0	209.6	297.9	126.3	65.7	39.3	13.0
Jun-04	638.8	511.9	216.3	295.4	126.9	67.8	39.5	12.8
Jul-04	633.0	510.1	212.4	297.0	122.9	60.1	41.8	12.7
Aug-04	613.0	495.5	203.9	293.1	117.5	56.3	38.8	12.6
Sep-04	647.6	527.8	205.8	304.2	119.8	58.4	40.4	12.6
Oct-04	610.9	492.9	203.1	293.6	118.0	58.6	39.6	11.6
Nov-04	605.6	493.9	201.7	296.7	111.7	56.4	35.9	12.0
Dec-04	606.3	491.4	198.9	290.7	114.9	55.7	39.2	12.1
Jan-05	577.9	463.2	180.0	286.5	114.7	54.7	40.3	12.2
Feb-05	603.1	482.7	199.3	286.3	120.4	60.9	40.4	12.3
Mar-05	593.1	472.7	196.8	279.0	120.4	62.4	42.1	11.4
Month-over-month growth rates								
Mar-04	1.8	3.1	2.3	5.6	-4.1	3.4	-1.1	-5.1
Apr-04	3.2	1.4	0.2	-0.5	11.8	8.3	2.9	12.5
May-04	0.3	-1.1	-1.5	-0.9	6.3	3.7	6.8	12.0
Jun-04	1.0	1.2	3.2	-0.9	0.5	3.3	0.5	-1.5
Jul-04	-0.9	-0.3	-1.8	0.6	-3.1	-11.4	5.8	-0.9
Aug-04	-3.2	-2.9	-4.0	-1.3	-4.4	-6.3	-7.2	-0.9
Sep-04	5.6	6.5	0.9	3.8	2.0	3.7	4.3	0.3
Oct-04	-5.7	-6.6	-1.3	-3.5	-1.5	0.3	-2.0	-8.0
Nov-04	-0.9	0.2	-0.7	1.1	-5.4	-3.7	-9.4	3.6
Dec-04	0.1	-0.5	-1.4	-2.0	2.9	-1.1	9.1	0.4
Jan-05	-4.7	-5.7	-9.5	-1.4	-0.2	-2.0	3.0	0.6
Feb-05	4.4	4.2	10.7	-0.1	5.0	11.4	0.2	1.0
Mar-05	-1.7	-2.1	-1.3	-2.5	0.0	2.4	4.1	-6.9

* Seasonally adjusted totals for US and overseas entries are calculated by Statistics Canada, and are adjusted to sum to national totals. Therefore, same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)					Other Transportation (000s)		
	Vancouver				Victoria	BC Ferries		Coquihalla Hwy Passenger Vehicles
	Total	Domestic	Trans- border	Other Int'l.		Vehicles	Passengers	

Annual data

2000	16,033	8,306	4,074	3,652	1,139	7,887	21,280	2,400
2001	15,477	7,869	4,001	3,608	1,158	8,104	21,309	2,461
2002	14,878	7,422	3,855	3,600	1,102	8,272	21,540	2,530
2003	14,321	7,266	3,814	3,240	1,183	8,263	21,348	2,480
2004	15,725	7,986	3,964	3,775	1,250	8,532	21,953	2,586

Annual growth rates

2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.7	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.8	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0
2004	9.8	9.9	3.9	16.5	5.7	3.3	2.8	4.3

Monthly data

Mar-04	1,274	649	324	301	101	711	1,831	219
Apr-04	1,305	654	337	314	104	715	1,874	221
May-04	1,317	658	329	330	103	703	1,823	217
Jun-04	1,323	669	323	332	103	703	1,812	214
Jul-04	1,316	671	322	324	104	709	1,821	219
Aug-04	1,303	658	328	317	100	696	1,777	209
Sep-04	1,344	685	339	319	110	712	1,834	223
Oct-04	1,320	670	336	314	104	719	1,852	215
Nov-04	1,340	685	341	315	105	726	1,867	221
Dec-04	1,347	695	338	314	108	749	1,896	216
Jan-05	1,368	711	345	313	109	682	1,721	206
Feb-05	1,357	703	333	321	111	726	1,857	227
Mar-05	1,382	707	350	325	115	723	1,846	225

Month-over-month growth rates

Mar-04	-1.2	-2.4	-1.8	2.0	-3.7	0.8	1.3	3.7
Apr-04	2.4	0.6	4.0	4.4	3.2	0.6	2.3	1.1
May-04	1.0	0.7	-2.2	5.1	-1.5	-1.7	-2.7	-1.9
Jun-04	0.4	1.6	-2.1	0.6	0.7	0.0	-0.6	-1.4
Jul-04	-0.5	0.4	-0.2	-2.5	0.8	0.9	0.5	2.2
Aug-04	-1.0	-2.0	2.0	-2.1	-3.8	-1.9	-2.4	-4.6
Sep-04	3.1	4.2	3.3	0.8	9.6	2.3	3.2	6.8
Oct-04	-1.8	-2.2	-1.0	-1.7	-5.2	1.0	1.0	-3.3
Nov-04	1.6	2.2	1.5	0.3	1.1	1.1	0.8	2.8
Dec-04	0.5	1.5	-0.9	-0.4	2.6	3.2	1.5	-2.2
Jan-05	1.6	2.2	2.0	-0.3	1.2	-9.0	-9.2	-5.0
Feb-05	-0.8	-1.1	-3.4	2.6	2.2	6.4	7.9	10.3
Mar-05	1.9	0.6	5.2	1.2	2.8	-0.3	-0.6	-0.6

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel Industry ²		Consumer Price Index ¹	
	Total tourism related	Air transport ⁴	Accommodation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%) ³	Room Rate (\$)	Traveller accommodation	Restaurant food ⁴

Annual data

2000	188.4	14.8	28.2	116.7	28.8	60.0	114.03	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.13	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	117.00	124.2	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	113.72	111.8	127.6
2004	193.2	13.0	27.6	117.8	34.8	61.6	115.55	102.5	129.9

Annual Growth Rates

2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.7	0.8	-6.9	3.3
2003	1.1	4.4	-0.7	-0.3	6.8	-1.1	-2.8	-9.9	1.8
2004	0.2	2.2	-4.7	0.0	4.3	5.7	1.6	-8.4	1.8

Monthly data

Mar-04	193.7	12.8	27.5	118.2	35.2	60.8	114.00	102.8	129.1
Apr-04	192.6	12.7	27.6	117.8	34.5	62.1	116.30	102.6	129.6
May-04	192.8	12.8	28.4	117.2	34.4	62.0	116.00	102.5	129.8
Jun-04	192.8	13.3	27.5	117.7	34.3	62.6	115.80	102.4	129.9
Jul-04	192.1	13.0	27.6	116.9	34.6	61.8	116.00	102.1	129.9
Aug-04	193.9	13.2	27.3	117.8	35.5	59.7	115.50	100.9	129.7
Sep-04	193.5	13.2	27.6	116.9	35.8	62.4	116.00	102.0	130.0
Oct-04	191.4	13.4	27.4	116.2	34.4	62.1	115.00	102.0	130.3
Nov-04	193.8	13.2	27.2	117.8	35.6	62.8	115.70	103.3	130.6
Dec-04	195.6	13.0	27.6	118.8	36.2	63.5	117.10	103.5	131.9
Jan-05	195.4	13.2	27.6	118.8	35.8	61.3	110.80	104.2	131.7
Feb-05	196.1	13.1	28.2	119.0	35.9	63.2	110.00	103.6	131.9
Mar-05	195.9	12.8	27.9	119.1	36.1	64.1	110.80	102.9	132.3

Month-over-month growth rates

Mar-04	1.1	-1.2	0.4	0.4	5.1	1.9	-0.4	0.5	0.1
Apr-04	-0.6	-1.2	0.5	-0.3	-2.0	1.3	2.0	-0.2	0.4
May-04	0.1	1.1	2.9	-0.5	-0.3	-0.1	-0.3	-0.1	0.2
Jun-04	0.0	4.1	-3.1	0.4	-0.5	0.6	-0.2	-0.1	0.1
Jul-04	-0.4	-2.1	0.3	-0.7	0.9	-0.8	0.2	-0.3	0.0
Aug-04	0.9	1.2	-1.1	0.8	2.8	-2.1	-0.4	-1.2	-0.2
Sep-04	-0.2	0.3	0.9	-0.8	0.7	2.7	0.4	1.1	0.2
Oct-04	-1.1	0.9	-0.7	-0.6	-3.7	-0.3	-0.9	0.0	0.2
Nov-04	1.3	-1.4	-0.6	1.4	3.3	0.7	0.6	1.3	0.2
Dec-04	0.9	-1.5	1.5	0.8	1.8	0.7	1.2	0.2	1.0
Jan-05	-0.1	2.0	0.0	0.0	-1.3	-2.2	-5.4	0.7	-0.2
Feb-05	0.4	-1.2	2.0	0.2	0.4	1.9	-0.7	-0.6	0.2
Mar-05	-0.1	-1.9	-0.9	0.1	0.4	0.9	0.7	-0.7	0.3

¹Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

²Source: Pannell Kerr Forster and BC Stats

³Occupancy Rate change expressed as percentage point change

⁴No identifiable seasonality.

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns ¹					
	Receipts (\$ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services

Annual data

2000	5,079.6	505.6	4,574.1	32,568.0	2,487.5	30,080.5
2001	5,317.2	533.7	4,783.5	33,743.3	2,602.8	31,140.5
2002	5,403.0	546.2	4,856.8	34,527.9	2,610.2	31,917.7
2003	5,654.4	584.9	5,069.5	35,043.2	2,626.9	32,416.4
2004	5,969.2	625.0	5,344.1	36,670.1	2,707.4	33,962.7

Annual growth rates

2000	5.3	5.3	5.2	6.9	4.3	7.2
2001	4.7	5.6	4.6	3.6	4.6	3.5
2002	1.6	2.3	1.5	2.3	0.3	2.5
2003	4.7	7.1	4.4	1.5	0.6	1.6
2004	5.6	6.9	5.4	4.6	3.1	4.8

Monthly data

Mar-04	492	52	440	3,060	223	2,836
Apr-04	493	51	442	3,037	224	2,813
May-04	495	52	443	3,059	229	2,830
Jun-04	498	53	445	3,056	230	2,826
Jul-04	491	52	438	3,045	233	2,812
Aug-04	496	51	446	3,114	223	2,891
Sep-04	505	52	453	3,069	223	2,846
Oct-04	505	53	451	3,064	226	2,839
Nov-04	527	52	475	3,158	217	2,941
Dec-04	496	52	444	3,028	223	2,805
Jan-05	521	53	469	3,184	227	2,957
Feb-05	552	50	502	3,227	224	3,003
Mar-05	523	46	477	3,145	230	2,915

Month-over-month growth rates

Mar-04	2.2	-0.3	2.5	2.2	-2.3	2.6
Apr-04	0.2	-1.0	0.4	-0.7	0.5	-0.8
May-04	0.4	1.7	0.2	0.7	1.9	0.6
Jun-04	0.5	1.2	0.4	-0.1	0.8	-0.2
Jul-04	-1.4	-0.9	-1.4	-0.4	1.1	-0.5
Aug-04	1.2	-2.9	1.6	2.3	-4.3	2.8
Sep-04	1.7	2.3	1.6	-1.4	0.2	-1.6
Oct-04	0.0	2.6	-0.3	-0.2	1.2	-0.3
Nov-04	4.4	-2.2	5.2	3.0	-3.9	3.6
Dec-04	-5.9	-0.4	-6.5	-4.1	3.0	-4.6
Jan-05	5.1	1.2	5.6	5.1	1.7	5.4
Feb-05	5.9	-4.8	7.1	1.3	-1.5	1.6
Mar-05	-5.2	-7.3	-5.0	-2.5	3.0	-2.9

¹Source: Statistics Canada & BC Stats.

NUMBER

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Tourism Sector Monitor ♦ June 2005

Room Revenue

Room revenues increased for the second straight month in March (+1.4%, *seasonally adjusted*), due mainly to the three largest regions, Vancouver Island/Coast (+4.1%) and Thompson/Okanagan (+2.3%), Mainland/Southwest (+1.5%), posting significant gains. Room revenues declined significantly in Northeast (-9.0%), where work camp activity slowed. Revenues were also down in Nechako (-3.1%), Kootenay (-1.8%) and Cariboo (-0.3%).

Room revenues increase in March

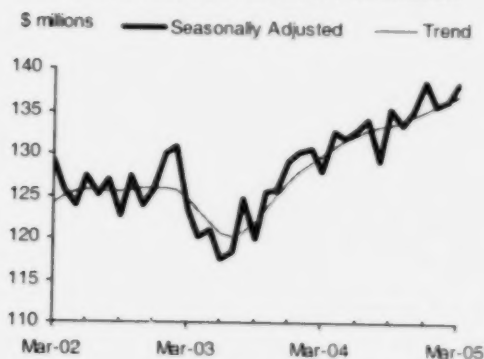


Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type			
	Mar 05 (\$000)	Feb 05 (\$000)	% change
Total	138,274	136,343	+1.4
Hotels	101,386	98,861	+2.6
Motels	17,787	17,380	+2.3
Other Acc.	18,870	19,053	-1.0
Regions (Top 3 performers)			
Vancouver Island/ Coast	26,730	25,689	+4.1
Thompson/Okanagan	21,616	21,137	+2.3
Mainland/Southwest	71,804	70,716	+1.5

Province-wide, the greatest gains in revenues were posted by very large hotels (251+ rooms, +3.4%), small hotels (1-75 rooms, +6.5%) and motels (+2.3%). Vacation rentals (-2.0%) experienced slow business for the second consecutive month, while non-standard accommodation (including bed and breakfast and other short term accommodations) edged up (+0.5%).

Visitor Entries

The volume of travellers entering Canada via BC borders decreased (-1.7%, *seasonally adjusted*) in March. This was mostly due to a decline in entries from the US (-2.2%). There were significantly fewer same-day (-2.2%) and overnight (-2.6%) travellers from the States.

Overseas entries edged up (+0.4%) with significant growth from Europe (+3.7%) and Asia (+3.2%) largely offset by a drop in visitors from Australia, New Zealand and the South Pacific (-3.8%).

BC's top two European markets performed well in March, with substantial growth in entries from Germany (+4.8%) and Britain (+1.9%). The upturn in Asian travellers was mainly a result of an increase in the number of visitors from Japan (+4.9%) and South Korea (+1.1%).

Canadians travelling abroad rose (+6.5%) for the second consecutive month, as more Canadians made same-day trips to the US (+6.5%) and overseas (+2.3%).

Visitor entries declined in March

Visitor entries (thousands)

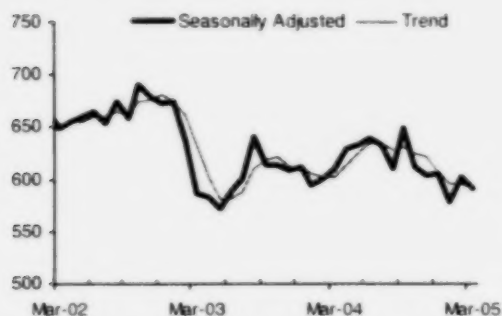


Table 2. Traveller Entries
(seasonally adjusted)

	Mar-05	Feb-05	% chg from Feb-05
	('000)	('000)	
American visitors			
Total	471	481	-2.2
Same-day	192	197	-2.2
Overnight	280	287	-2.6
Overseas visitors			
Total	121	121	0.4
Europe	42	40	3.7
UK	20	20	1.9
Asia	63	61	3.2
Japan	20	19	4.9
Taiwan	9	9	-3.0
Oceania	12	12	-3.8

(BC STATS & Statistics Canada)

Note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Transportation indicators were mixed in March. The number of passengers at both the Vancouver (+1.3%) and Victoria (+1.8%) airports increased.

After a month of strong passenger vehicle traffic in February, the number of cars on the Coquihalla Highway declined (-1.3%) in March. Passenger volume (-0.5%) and vehicles (-0.2%) aboard BC Ferries were also down.

Restaurant, caterer and tavern receipts posted significant losses in March (-3.1%, *seasonally adjusted*), as both food services (-2.2%) and drinking places (-12.7%) recorded declines.

Other Indicators

In the hotel industry, hotel occupancy edged up (+0.6 percentage points) while average room rates dropped (-0.2%) in March.

Employment in key tourism-related industries crept up (+0.1%) mostly due to modest gains in the food & beverage services industry (+0.4%), while all the other sectors experienced job losses. The Consumer Price Index for traveller accommodation edged down (-0.9%), while the cost of restaurant food (+0.3%) advanced marginally in March.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Change from	
	Mar-05	Feb-05
Hotel Industry		
Occupancy rate	63.6	0.6 pp.
Average room charge (Pamell Kerr Forster)	111.90	-0.2%
Airport Passengers (000s) (%)		
Vancouver International Airport		
Total traffic	1,381	1.3
US (trans-border)	350	5.2
Other International	330	1.6
Canada (domestic) (YVR)	701	-0.7
Victoria International Airport		
Total traffic (Victoria Airport Authority)	113	1.8
Restaurant Receipts (\$ millions) (%)		
All establishments	528	-3.1
Food service	485	-2.2
Drinking places (Statistics Canada)	43	-12.7
Transportation (000s) (%)		
Coquihalla Highway		
Passenger Vehicles (Ministry of Transportation & Highways)	224	-1.3
BC Ferries		
Vehicle Volume	725	-0.2
Passenger Volume (BC Ferries)	1,847	-0.5
Exchange Rates Cdn \$		
US \$	0.822	0.02
UK Pound	0.431	0.00
Japanese Yen	86.520	1.83
Australian \$ (Statistics Canada)	1.047	0.02

Note: pp. percentage points

Note to readers: all data in the *Tourism Sector Monitor* are reported on a seasonally adjusted basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues decreased (-1.1%, *seasonally adjusted*) in April, as six regions posted month-over-month declines. The three biggest development regions, Mainland/Southwest (-0.6%), Vancouver Island/Coast (-2.1%) and Thompson/ Okanagan (-1.2%), recorded lower room revenues in April.

Province-wide, revenues were down for every type of tourism establishment except for large hotels (151-250 rooms, +3.4%) and motels

(+0.6%). Vacation rentals (-17.2%) and other non-standard accommodation types—bed and breakfast, work camps and resorts—experienced a weak month (-6.9%).

Visitor entries edged up in April (+0.4%, *seasonally adjusted*). This was a result of an increase in the number of travellers from overseas (+3.6%) offset by a decline in entries from the US (-0.5%).

Transportation indicators were down with airports in both Vancouver (-0.6%) and Victoria (-1.9%) reporting less activity. There were also fewer passengers (-0.4%) and vehicles (-0.6%) aboard BC Ferries.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

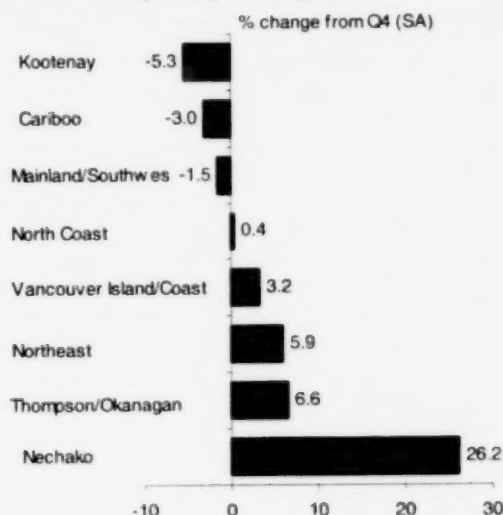
How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

Special Focus: First quarter review of BC's tourism sector

Room revenues inched up in the first quarter of 2005

Room revenues edged up (+0.8%, *seasonally adjusted*) in the first quarter of 2005, posting a seventh consecutive quarterly gain. Revenues were up in five out of eight regions, with significant growth in Nechako (+26.2%), Thompson/Okanagan (+6.6%), Northeast (+5.9%) and Vancouver/Island (+3.2%). Lower room revenues were recorded in Kootenay (-5.3%), Cariboo (-3.0%) and Mainland/Southwest (-1.5%).

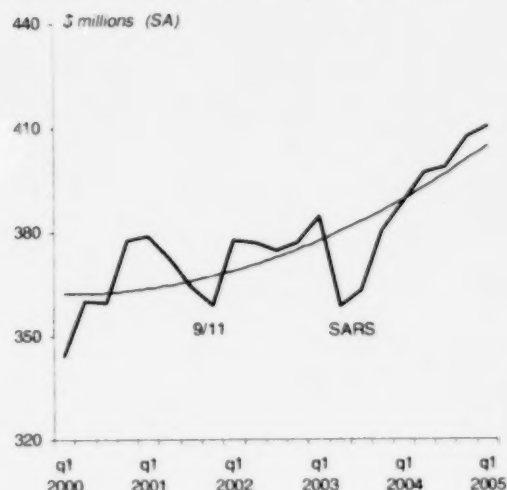
Nechako led first quarter growth



Data Source: BC Stats

However, the gain in revenues in Vancouver/Island (+3.2%), Thompson/Okanagan (+6.6%), and the two sparsely populated northern areas, Nechako (+26.2%) and Northeast (5.9%), was enough to offset losses in other regions. Nechako experienced strong growth in revenues in the first quarter of 2005 due to filming activities in the Smithers area while, in the Northeast, revenues for temporary accommodations for workers were robust.

Room revenues back on upward track



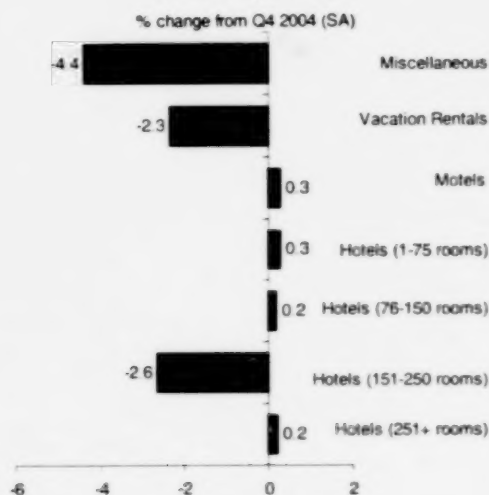
Data Source: BC Stats

Over the long run, BC's accommodation industry has displayed an ability to withstand shocks. The recovery that started in the last quarter of 2003 continued this year. In the first quarter of 2005 revenues surpassed pre-9/11 levels, reaching \$410 million.

Revenues inched up at hotels of all sizes with the exception of large hotels (151-250 rooms, -2.6%) posting sizable declines. Very large hotels (251+ rooms, +0.2%), mid-sized hotels (76-150, rooms, +0.2%), small hotels (1-75 rooms, +0.3%) and motels (+0.3%) saw slight increases in revenues.

Business was slower at vacation rentals (-2.3%) and other types of accommodations (including bed and breakfast, fishing lodges and other kinds of short-term accommodation (-4.4%).

Mid-size accommodation busier in the first quarter of 2005



Data Source: BC Stats

Visitor entries declined

The volume of travellers entering Canada via BC decreased (-2.8%) in the first quarter, as entries from the US (-4.2%) offset growth in the overseas visitors market (+3.5%). US same-day (-5.3%) and overnight (-3.5%) traffic slumped in the first quarter of this year.

US entries continued to slip



Data Source: Statistics Canada

Overseas visitor entries increased (+3.5%), due to an upturn in visitors from Europe (+6.9%), Asia (+5.5%) and Oceania (Australia and South Pacific, +1.1%). Among the overseas markets, the German (+19.0%) and UK (+7.0%) markets recorded the highest growth in the first quarter.

The number of Canadians re-entering the country via BC rose substantially (+2.5%) in the first quarter as more Canadians travelled overseas (+2.1%) or made same-day excursions to the US (+0.8%).

Most tourism indicators robust

Hotel occupancy rates averaged 62.6% (seasonally adjusted) in the first quarter, decreasing 0.2 percentage points. Average room rates (\$112) were 3.5% lower than the previous quarter.

Air passenger traffic registered a strong quarter, with both Vancouver (+2.7%) and Victoria (5.2%) airports experiencing higher volumes on all types of flights. BC ferries were not as busy, carrying fewer passengers (-3.6%) and vehicles (-2.8%) while traffic on the Coquihalla Highway was up slightly (+0.6%) relative to the fourth quarter of last year.

Employment in the key tourism-related industries edged up (+0.6%) in the first quarter of 2005. The accommodation (+1.9%) and arts, entertainment & recreation (+0.8%) industries increased employment moderately, while the air transport sector (-0.9%) registered modest job losses.

Restaurant, caterer and tavern receipts posted significant gains in the first quarter (+4.3%), as an increase in revenues at food service establishments (+5.6%) offset decline in receipts at drinking places (-7.3%).

Table 1: Room Revenue by Development Region (\$000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,244	863,427	229,533	76,892	46,162	20,160	8,811	51,889	1,592,118

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	4.1	-1.3	12.2	7.1

Monthly data

Mar-04	23,670	69,195	18,776	6,320	3,810	1,546	594	4,121	128,032
Apr-04	23,921	73,226	18,695	6,644	3,629	1,700	796	4,017	132,629
May-04	23,785	73,149	19,026	6,171	3,643	1,651	731	3,749	131,906
Jun-04	24,293	73,462	18,771	6,291	3,771	1,706	743	3,854	132,890
Jul-04	24,553	73,437	19,196	6,522	3,782	1,754	736	4,181	134,161
Aug-04	24,472	69,772	18,496	6,175	3,840	1,721	722	4,017	129,215
Sep-04	25,076	73,863	19,154	6,469	3,820	1,673	768	4,478	135,301
Oct-04	24,667	71,648	19,027	6,271	3,920	1,707	735	5,491	133,466
Nov-04	25,229	71,909	19,951	6,481	3,960	1,744	765	5,159	135,198
Dec-04	26,246	73,728	20,325	6,219	4,742	1,544	787	4,935	138,525
Jan-05	26,137	71,470	20,476	6,153	3,901	1,622	849	5,148	135,756
Feb-05	25,689	70,716	21,137	5,954	4,177	1,689	1,035	5,945	136,343
Mar-05	26,730	71,804	21,616	5,848	4,164	1,702	1,003	5,408	138,274

Month-over-month growth rates

Mar-04	-2.3	-2.0	0.5	-8.7	5.4	-8.0	-16.1	1.6	-1.9
Apr-04	1.1	5.8	-0.4	5.1	-4.7	10.0	34.0	-2.5	3.6
May-04	-0.6	-0.1	1.8	-7.1	0.4	-2.9	-8.2	-6.7	-0.5
Jun-04	2.1	0.4	-1.3	1.9	3.5	3.4	1.6	2.8	0.7
Jul-04	1.1	0.0	2.3	3.7	0.3	2.8	-1.0	8.5	1.0
Aug-04	-0.3	-5.0	-3.6	-5.3	1.5	-1.9	-1.9	-3.9	-3.7
Sep-04	2.5	5.9	3.6	4.8	-0.5	-2.8	6.4	11.5	4.7
Oct-04	-1.6	-3.0	-0.7	-3.1	2.6	2.0	-4.3	22.6	-1.4
Nov-04	2.3	0.4	4.9	3.3	1.0	2.2	4.1	-6.0	1.3
Dec-04	4.0	2.5	1.9	-4.0	19.7	-11.5	2.8	-4.4	2.5
Jan-05	-0.4	-3.1	0.7	-1.0	-17.7	5.0	7.8	4.3	-2.0
Feb-05	-1.7	-1.1	3.2	-3.2	7.1	4.2	22.0	15.5	0.4
Mar-05	4.1	1.5	2.3	-1.8	-0.3	0.7	-3.1	-9.0	1.4

March month-over-month percent growth

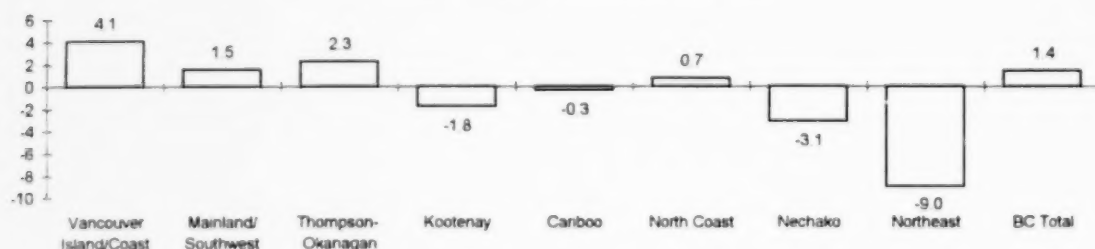


Table 2: Room Revenue by Accommodation Type (\$000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			

Annual data

2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423
2004	467,820	198,608	321,679	185,692	195,026	124,420	98,872

Annual growth rates

2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
2004	6.8	9.8	8.2	6.6	7.5	4.1	3.6

Monthly data

Mar-04	38,540	16,259	26,157	14,911	15,832	9,482	7,707
Apr-04	40,120	15,795	26,727	15,344	15,896	9,877	7,969
May-04	40,324	16,453	26,902	15,400	15,893	10,139	7,960
Jun-04	40,154	16,709	26,894	15,559	16,079	10,126	8,076
Jul-04	38,873	16,549	27,170	15,796	16,482	10,405	8,463
Aug-04	37,661	16,331	26,132	15,399	15,439	10,367	8,265
Sep-04	40,246	17,056	27,149	15,900	16,337	10,711	8,682
Oct-04	37,178	16,671	27,101	16,036	16,517	11,302	8,296
Nov-04	37,596	17,741	27,981	15,706	17,710	11,330	8,557
Dec-04	42,681	17,307	27,311	15,510	17,249	11,470	8,315
Jan-05	39,114	16,556	27,179	14,953	16,454	11,499	7,951
Feb-05	38,651	16,897	27,609	15,705	17,380	11,017	8,036
Mar-05	39,971	16,905	27,778	16,732	17,787	10,793	8,077

Month-over-month growth rates

Mar-04	2.1	3.8	0.8	0.0	0.7	-4.1	-6.3
Apr-04	4.1	-2.9	2.2	2.9	0.4	4.2	3.4
May-04	0.5	4.2	0.7	0.4	0.0	2.7	-0.1
Jun-04	-0.4	1.6	0.0	1.0	1.2	-0.1	1.5
Jul-04	-3.2	-1.0	1.0	1.5	2.5	2.8	4.8
Aug-04	-3.1	-1.3	-3.8	-2.5	-6.3	-0.4	-2.3
Sep-04	6.9	4.4	3.9	3.3	5.8	3.3	5.0
Oct-04	-7.6	-2.3	-0.2	0.9	1.1	5.5	-4.5
Nov-04	1.1	6.4	3.2	-2.1	7.2	0.2	3.2
Dec-04	13.5	-2.4	-2.4	-1.2	-2.6	1.2	-2.8
Jan-05	-8.4	-4.3	-0.5	-3.6	-4.6	0.3	-4.4
Feb-05	-1.2	2.1	1.6	5.0	5.6	-4.2	1.1
Mar-05	3.4	0.0	0.6	6.5	2.3	-2.0	0.5

March month-over-month percent growth

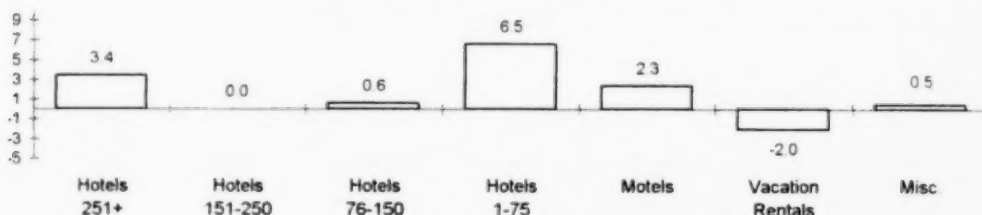


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Mar-05	YTD 05	Mar-04	YTD 04	Mar-05	Mar-04	Mar-05	Mar-04
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	11,516	26,136	16.6	11.6	166	15	8,298	448
Total - Hotels	9,729	22,082	14.8	10.3	69	5	5,610	300
76+ Rooms	7,548	17,060	13.9	9.3	26	1	3,937	236
1-75 Rooms	2,181	5,022	18.0	13.8	43	4	1,673	64
Motels	992	2,179	23.1	8.9	29	2	1,123	95
Vacation Rentals	272	625	28.3	16.9	25	5	312	22
19 Cowichan Valley								
Total - All accommodation types	603	1,571	17.4	21.2	33	0	641	-2
Motels	158	397	-3.9	5.8	16	0	316	11
21 Nanaimo								
Total - All accommodation types	2,742	6,585	7.5	7.0	66	1	2,466	-99
Total - Hotels	1,481	3,662	2.6	3.8	19	0	1,174	-166
Motels	577	1,331	13.4	14.6	24	1	637	74
Vacation Rentals	594	1,358	8.3	5.1	17	1	533	-1
23 Alberni-Clayoquot								
Total - All accommodation types	2,587	5,640	35.5	23.2	56	-1	1,352	31
Motels	253	535	37.0	36.7	21	1	417	12
Vacation Rentals	1,093	2,283	49.5	43.3	15	-1	341	18
25 Comox-Strathcona								
Total - All accommodation types	1,686	4,181	-14.5	-17.4	59	-4	1,659	-54
Motels	567	1,267	1.8	-9.8	25	-2	664	-38
Vacation Rentals	82	291	-68.7	-59.6	15	0	173	-20
27 Powell River								
Total - All accommodation types	-	-	-	-	17	1	362	22
43 Mount Waddington								
Total - All accommodation types	221	560	3.4	2.8	19	4	560	67
Total - Hotels	140	348	-4.3	-2.0	11	2	446	25
45 Central Coast								
Total - All accommodation types	-	-	-	-	6	0	95	-1
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	3,124	7,590	4.1	-1.3	65	-3	2,443	-146
Total - Hotels	2,354	5,731	6.0	3.0	19	-2	1,362	-68
Motels	639	1,388	32.4	21.3	35	-1	927	-25
15 Greater Vancouver								
Total - All accommodation types	43,612	114,374	-2.0	4.6	236	4	26,121	487
Total - Hotels	40,669	105,640	-4.5	1.4	161	2	23,034	-132
251+ Rooms	21,326	55,994	-12.8	-1.9	24	-1	9,678	-278
151-250 Rooms	8,004	20,811	3.5	2.0	25	0	4,752	0
76-150 Rooms	8,578	21,899	9.2	9.3	53	0	5,768	19
1-75 Rooms	2,761	6,937	8.3	4.1	59	3	2,836	127
Motels	1,344	3,187	23.9	11.4	37	0	1,809	52
Vacation Rentals	1,314	4,681	122.7	200.2	19	2	731	158
29 Sunshine Coast								
Total - All accommodation types	252	582	5.0	-1.4	18	-2	328	-38
31 Squamish-Lillooet								
Total - All accommodation types	25,556	79,181	-4.0	-6.6	101	2	7,629	440
Total - Hotels	20,266	62,822	-3.7	-6.4	46	2	5,765	329
151+ Rooms	13,841	43,129	1.9	-2.2	11	1	3,429	272
76-150 Rooms	5,047	15,320	-9.4	-11.2	16	1	1,604	85
1-75 Rooms	1,378	4,374	-27.0	-24.3	19	0	732	-28
Vacation Rentals	3,984	12,242	-2.3	-4.4	31	1	1,289	67
Miscellaneous	1,199	3,821	-14.6	-15.2	17	-1	406	44
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	1,976	4,450	17.5	7.8	92	-8	2,832	-94
Total - Hotels	1,133	2,400	6.1	-8.5	16	-2	1,063	-116
Motels	592	1,212	12.6	10.2	59	-6	1,491	-71

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Mar-05	YTD 05	Mar-04	YTD 04	Mar-05	Mar-04	Mar-05	Mar-04
33 Thompson-Nicola								
Total - All accommodation types	5,136	14,372	-0.2	3.3	138	-1	5,265	-15
Total - Hotels	2,300	5,691	-0.9	0.9	34	0	2,206	9
76+ Rooms	1,894	4,670	-2.8	-0.1	12	0	1,388	-1
1-75 Rooms	407	1,021	9.2	5.9	22	0	818	10
Motels	1,141	2,556	12.9	5.4	79	2	2,332	28
Miscellaneous	328	1,038	8.7	18.9	13	-1	264	-25
35 Central Okanagan								
Total - All accommodation types	6,998	15,745	47.8	24.1	61	0	3,563	-278
Total - Hotels	4,168	9,555	35.7	20.0	22	1	1,916	4
76+ Rooms	3,169	7,424	23.1	13.9	11	0	1,477	0
1-75 Rooms	999	2,131	100.6	47.6	11	1	439	4
Motels	664	1,521	1.8	-0.7	23	-3	1,075	-76
Vacation Rentals	2,096	4,543	116.0	46.7	12	2	404	19
37 North Okanagan								
Total - All accommodation types	2,006	6,404	14.4	11.5	39	-1	1,554	-67
Total - Hotels	1,348	4,464	18.5	13.0	14	0	806	0
Motels	391	1,001	-4.8	8.4	17	-2	567	-75
39 Columbia-Shuswap								
Total - All accommodation types	3,200	7,962	29.1	14.8	91	-3	2,927	-15
Total - Hotels	1,119	2,814	17.3	8.5	18	0	1,032	-1
Motels	848	2,089	13.6	6.9	43	-2	1,409	-81
Miscellaneous	1,137	2,674	68.1	27.0	23	1	390	70
Kootenay								
01 East Kootenay								
Total - All accommodation types	5,214	14,992	-13.3	-11.6	108	-3	4,300	-282
Total - Hotels	2,081	5,671	15.2	8.0	27	1	1,556	25
Motels	740	1,817	7.8	-5.0	46	1	1,139	10
Vacation Rentals	1,331	4,173	-33.4	-23.8	13	-7	931	2
03 Central Kootenay								
Total - All accommodation types	1,380	3,426	12.9	4.5	71	4	1,469	88
Total - Hotels	762	1,880	9.1	5.6	19	4	765	105
Motels	331	759	37.2	19.0	28	0	515	-3
Vacation Rentals	78	199	55.0	43.8	12	1	97	28
05 Kootenay Boundary								
Total - All accommodation types	500	1,456	-5.4	-8.4	38	2	723	29
Motels	207	525	-0.8	-8.7	23	0	400	2
Cariboo								
41 Cariboo								
Total - All accommodation types	1,020	2,592	6.3	4.2	61	-5	1,673	-7
Motels	621	1,553	11.3	8.0	34	-1	1,019	-7
53 Fraser-Fort George								
Total - All accommodation types	2,521	6,225	11.3	14.0	54	2	2,558	45
Total - Hotels	1,836	4,598	12.0	14.8	20	2	1,496	109
Motels	569	1,344	17.7	19.0	29	0	970	-8
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	403	1,229	-9.8	-7.2	26	-3	929	-30
Motels	102	300	-22.4	-16.8	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	733	1,663	23.5	8.0	31	0	780	-13
Motels	286	614	51.2	17.2	17	0	387	-17
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	841	1,993	65.8	44.2	43	3	1,101	13
Motels	397	992	34.6	24.1	27	2	702	56
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	7,430	22,583	13.2	30.4	73	3	3,192	-415
Total - Hotels	3,173	8,531	4.9	9.0	24	1	1,589	40
Motels	1,481	3,742	18.6	18.5	33	2	906	11
Vacation Rentals	2,521	9,542	20.4	61.9	11	-1	491	-550

"-" Data for regions with fewer than 10 properties reporting can not be released

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Mar-05	YTD 05	Mar-04	YTD 04	Mar-05	Mar-04	Mar-05	Mar-04
Vancouver Island/Coast	19,640	45,360	13.6	7.2	422	16	15,443	412
Victoria (C)	9,551	21,521	16.5	10.7	83	8	5,796	493
Other CRD	1,380	3,231	-17.5	-18.8	74	-2	2,180	-367
Nanaimo (C)	1,631	4,068	5.5	7.6	23	1	1,225	50
Port Alberni (C)	277	764	14.1	32.2	14	2	363	28
Courtenay (C)	693	1,684	-7.6	-8.6	14	2	540	25
Rest of Development Region	6,106	14,092	25.3	11.0	228	7	5,339	183
Mainland/Southwest	72,544	201,726	-2.4	-0.3	420	1	36,521	743
Downtown Vancouver (C)	26,041	66,971	-8.8	0.6	85	2	12,913	42
Other Vancouver (C)	2,996	8,818	63.1	69.8	31	0	2,832	143
Richmond (C)	7,303	20,083	3.9	0.4	24	1	4,371	50
Burnaby (C)	1,848	4,848	0.9	4.5	11	1	1,357	329
Other GVRD	5,424	13,654	3.7	6.0	85	0	4,648	10
Whistler (DM)	25,032	77,288	-4.2	-7.1	78	0	6,952	295
Rest of Development Region	3,899	10,064	3.9	2.4	106	-3	3,448	-126
Thompson/Okanagan	19,316	48,932	22.3	12.7	421	-13	16,141	-469
Penticton (C)	1,127	2,649	-1.8	-7.9	38	-4	1,572	-136
Kamloops (C)	4,261	12,090	-3.2	1.7	67	2	3,652	65
Kelowna (C)	6,721	15,071	48.8	25.3	51	-2	3,126	-289
Vernon (C)	1,986	6,332	15.3	11.8	33	0	1,457	-53
Revelstoke (C)	1,222	3,331	7.3	1.3	24	-2	975	-53
Rest of Development Region	4,000	9,460	39.6	23.6	208	-7	5,359	-3
Kootenay	7,095	19,874	-8.7	-8.9	217	3	6,492	-165
Cranbrook (C)	588	1,417	9.4	3.9	18	-1	815	-77
Nelson (C)	454	1,220	-0.6	-6.5	12	1	425	46
Rest of Development Region	6,053	17,237	-10.7	-10.0	199	4	5,677	-88
Cariboo	3,540	8,817	9.8	10.9	115	-3	4,231	38
Quesnel (C)	253	632	17.2	3.8	13	0	452	0
Williams Lake (C)	317	855	3.2	13.4	11	0	534	0
Prince George (C)	1,929	4,847	10.1	15.8	31	2	1,844	101
Rest of Development Region	1,041	2,482	9.7	3.5	60	-5	1,401	-63
North Coast	1,136	2,892	9.2	1.0	57	-3	1,709	-43
Prince Rupert (C)	325	1,055	-8.5	-5.4	15	0	761	0
Terrace (C)	444	989	-	-	12	3	413	66
Rest of Development Region	367	848	-	-	30	-6	535	-109
Nechako	841	1,993	65.8	44.2	43	3	1,101	13
Smithers (T)	535	1,161	113.9	77.1	13	1	426	26
Rest of Development Region	305	832	18.9	14.5	30	2	675	275
Northeast	7,430	22,583	13.2	30.4	73	3	3,192	-415
Dawson Creek (C)	881	2,322	21.6	35.5	13	0	471	-13
Fort St. John (C)	2,588	11,086	0.8	3.1	20	-1	1,181	-35
Rest of Development Region	3,961	9,174	21.1	89.2	40	4	1,540	-367

"-" Data for regions with fewer than 10 properties reporting can not be released.

Table 5: Historical Unadjusted Room Revenue by Development Region (\$000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
Annual data									
2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,244	863,427	229,533	76,892	46,162	20,160	8,811	51,889	1,592,118
Annual growth rates									
2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	4.1	-1.3	12.2	7.1
Monthly data									
Mar-04	17,288	74,357	15,792	7,768	3,224	1,040	507	6,565	126,540
Apr-04	19,495	63,507	12,696	5,004	3,223	1,056	545	3,660	109,186
May-04	25,608	71,530	18,051	4,761	3,831	1,504	652	2,397	128,335
Jun-04	31,380	81,609	21,957	5,917	4,699	2,786	984	3,231	152,563
Jul-04	44,238	98,094	37,609	9,647	5,481	3,434	1,051	3,896	203,450
Aug-04	49,430	101,815	37,115	10,120	6,109	3,253	1,100	4,029	212,971
Sep-04	35,179	81,870	23,602	7,603	5,219	2,367	1,172	4,075	161,087
Oct-04	20,981	55,010	13,961	4,252	3,996	1,251	886	5,132	105,468
Nov-04	13,405	43,212	8,484	2,886	2,856	959	570	4,183	76,555
Dec-04	13,224	64,448	12,659	4,875	2,799	685	469	3,971	103,130
Jan-05	11,280	61,240	13,132	5,700	2,447	729	486	5,918	100,931
Feb-05	14,441	67,943	16,484	7,079	2,830	1,027	666	9,235	119,705
Mar-05	19,640	72,544	19,316	7,095	3,540	1,136	841	7,430	131,541
Year-over-year percent changes									
Mar-04	3.8	1.4	7.0	0.3	7.8	-7.2	-15.9	-4.2	2.0
Apr-04	5.9	14.1	6.7	15.2	1.0	5.0	7.0	4.8	10.8
May-04	4.7	11.6	10.5	1.7	1.3	4.3	-2.1	-2.2	8.8
Jun-04	9.0	17.0	2.6	5.0	4.8	6.8	6.0	12.0	11.8
Jul-04	12.4	13.9	14.4	11.6	6.0	10.7	-0.7	3.6	13.0
Aug-04	5.2	0.6	0.2	1.5	9.7	4.7	-3.6	1.3	1.9
Sep-04	11.8	12.8	17.9	14.1	9.3	1.2	7.4	15.2	13.1
Oct-04	5.4	5.2	1.2	0.2	5.9	3.7	-8.0	48.5	5.9
Nov-04	5.1	4.3	5.5	16.2	8.9	6.2	5.9	41.0	6.7
Dec-04	12.4	8.6	8.6	-3.0	27.3	-17.5	3.4	4.4	8.5
Jan-05	3.6	2.9	4.9	-3.0	7.5	-7.8	17.1	33.7	4.4
Feb-05	2.2	-0.7	9.3	-13.5	15.5	-0.6	45.0	46.0	3.1
Mar-05	13.6	-2.4	22.3	-8.7	9.8	9.2	65.8	13.2	4.0

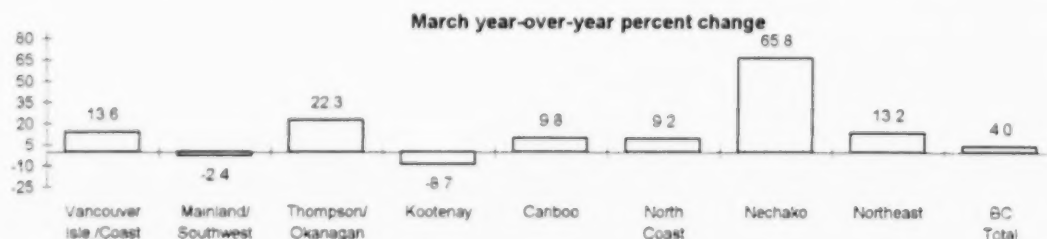


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**

Annual data

2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,970.8	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.8	118.0
2003	7,335.3	6,137.4	2,580.7	3,556.7	1,197.8	577.6	410.1	124.8
2004	7,423.9	6,020.7	2,468.0	3,571.1	1,403.2	715.8	458.1	144.3

Annual percent changes

2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.1	-4.3	-13.8	4.2	-3.0	4.4	-11.7	-10.5
2003	-8.0	-7.0	-8.1	-6.1	-12.9	-24.4	-0.4	5.8
2004	1.2	-1.9	-4.4	0.4	17.1	23.9	11.7	15.6

Monthly data

Apr-04	630.5	511.7	212.0	303.1	118.7	62.9	36.8	12.0
May-04	632.3	506.0	208.3	299.7	126.3	65.4	39.3	13.1
Jun-04	638.8	511.9	214.6	297.3	126.9	68.5	39.5	12.8
Jul-04	632.9	510.3	207.4	301.2	122.5	59.7	41.9	12.7
Aug-04	611.3	494.0	198.9	296.0	117.3	58.9	38.8	12.6
Sep-04	649.6	529.7	201.6	310.0	119.8	57.9	40.5	12.7
Oct-04	612.0	493.7	201.8	295.6	118.3	58.0	39.6	11.6
Nov-04	604.6	492.8	200.2	298.3	111.8	55.8	35.8	12.0
Dec-04	606.1	491.0	197.2	292.0	115.0	55.3	39.1	12.1
Jan-05	577.9	463.0	178.6	287.6	114.9	54.4	40.3	12.2
Feb-05	602.3	481.4	196.6	287.3	120.9	61.0	40.4	12.2
Mar-05	592.1	470.7	192.3	280.0	121.4	62.9	41.9	11.8
Apr-05	594.4	468.5	189.3	280.2	125.8	65.2	41.9	11.8

Month-over-month growth rates

Apr-04	3.2	1.4	0.2	0.1	11.8	6.9	2.5	19.9
May-04	0.3	-1.1	-1.8	-1.1	6.3	4.1	6.9	9.1
Jun-04	1.0	1.2	3.0	-0.8	0.5	4.7	0.5	-1.9
Jul-04	-0.9	-0.3	-3.4	1.3	-3.4	-12.9	6.1	-0.9
Aug-04	-3.4	-3.2	-4.1	-1.7	-4.3	-1.3	-7.5	-0.8
Sep-04	6.3	7.2	1.3	4.7	2.2	-1.7	4.3	0.5
Oct-04	-5.8	-6.8	0.1	-4.7	-1.3	0.1	-2.0	-8.4
Nov-04	-1.2	-0.2	-0.8	0.9	-5.4	-3.8	-9.7	3.7
Dec-04	0.2	-0.3	-1.5	-2.1	2.9	-0.9	9.3	0.3
Jan-05	-4.6	-5.7	-9.4	-1.5	-0.1	-1.5	3.0	0.7
Feb-05	4.2	4.0	10.0	-0.1	5.2	12.0	0.2	0.5
Mar-05	-1.7	-2.2	-2.2	-2.6	0.4	3.2	3.7	-3.8
Apr-05	0.4	-0.5	-1.5	0.1	3.6	3.6	0.1	0.1

* Seasonally adjusted totals for US and overseas entries are calculated by Statistics Canada, and are adjusted to sum to national totals. Therefore, same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)					Other Transportation (000s)		
	Vancouver				Victoria	BC Ferries		Coquitlam Hwy Passenger Vehicles
	Total	Domestic	Trans- border	Other Int'l.		Vehicles	Passengers	

Annual data

2000	16,033	8,306	4,074	3,652	1,139	7,887	21,280	2,400
2001	15,477	7,869	4,001	3,608	1,158	8,104	21,309	2,461
2002	14,877	7,422	3,855	3,600	1,102	8,272	21,540	2,530
2003	14,321	7,267	3,814	3,241	1,183	8,263	21,348	2,480
2004	15,726	7,986	3,965	3,776	1,250	8,532	21,953	2,586

Annual growth rates

2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.7	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.9	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0
2004	9.8	9.9	3.9	16.5	5.7	3.3	2.8	4.3

Monthly data

Apr-04	1,312	663	337	313	104	716	1,877	220
May-04	1,320	663	329	327	103	703	1,820	217
Jun-04	1,324	672	322	330	103	704	1,808	213
Jul-04	1,317	673	322	322	104	709	1,822	219
Aug-04	1,298	653	328	316	100	694	1,773	208
Sep-04	1,345	687	339	319	110	712	1,832	222
Oct-04	1,327	678	336	314	104	718	1,850	215
Nov-04	1,339	682	341	316	105	726	1,866	221
Dec-04	1,348	695	338	315	108	750	1,910	216
Jan-05	1,377	717	345	315	109	682	1,718	206
Feb-05	1,363	706	333	324	111	726	1,857	227
Mar-05	1,381	701	350	330	113	725	1,847	224
Apr-05	1,372	688	344	341	111	720	1,840	221

Month-over-month growth rates

Apr-04	2.9	2.3	4.0	2.8	3.2	0.7	2.6	0.5
May-04	0.6	0.0	-2.1	4.7	-1.7	-1.8	-3.1	-1.3
Jun-04	0.3	1.4	-2.1	0.7	0.7	0.1	-0.7	-1.7
Jul-04	-0.6	0.1	-0.2	-2.4	0.7	0.8	0.8	2.8
Aug-04	-1.4	-3.0	2.1	-1.7	-3.8	-2.1	-2.7	-5.0
Sep-04	3.7	5.2	3.3	0.9	9.5	2.6	3.3	6.7
Oct-04	-1.4	-1.4	-1.0	-1.7	-5.2	0.8	1.0	-3.2
Nov-04	0.9	0.7	1.5	0.6	1.1	1.1	0.9	2.9
Dec-04	0.7	1.9	-0.8	-0.3	2.4	3.3	2.4	-2.3
Jan-05	2.1	3.2	2.0	0.0	1.1	-9.1	-10.1	-4.8
Feb-05	-1.0	-1.6	-3.4	3.0	2.1	6.5	8.1	10.3
Mar-05	1.3	-0.7	5.2	1.6	1.8	-0.2	-0.5	-1.3
Apr-05	-0.6	-1.9	-1.9	3.5	-1.9	-0.6	-0.4	-1.5

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel Industry ²		Consumer Price Index ¹	
	Total tourism related	Air transport ⁴	Accommodation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%) ³	Room Rate (\$)	Traveller accommodation	Restaurant food ⁴

Annual data

2000	188.4	14.8	28.2	116.7	28.8	60.0	114.04	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.13	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	117.00	124.2	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	113.72	111.8	127.6
2004	193.2	13.0	27.6	117.8	34.8	61.5	115.62	102.5	129.9

Annual Growth Rates

2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.7	0.8	-6.9	3.3
2003	1.1	4.4	-0.7	-0.3	6.8	-1.0	-2.8	-9.9	1.8
2004	0.2	2.2	-4.7	0.0	4.3	5.5	1.7	-8.4	1.8

Monthly data

Apr-04	192.7	12.7	27.6	117.6	34.7	61.6	116.30	103.1	129.6
May-04	193.0	12.8	28.4	117.3	34.5	62.0	116.60	102.6	129.8
Jun-04	192.7	13.2	27.5	117.7	34.3	62.6	116.10	102.5	129.9
Jul-04	192.3	13.0	27.6	117.1	34.8	61.8	115.70	102.1	129.9
Aug-04	193.7	13.2	27.3	117.6	35.6	59.6	116.20	100.9	129.7
Sep-04	193.6	13.2	27.6	117.0	35.8	62.4	116.80	102.0	130.0
Oct-04	190.8	13.3	27.4	115.6	34.5	62.1	115.20	102.0	130.3
Nov-04	193.6	13.2	27.2	117.5	35.6	62.7	115.80	103.3	130.6
Dec-04	195.0	13.0	27.7	118.1	36.2	63.5	117.00	103.4	131.9
Jan-05	194.5	13.2	27.6	117.9	35.7	61.1	111.90	104.0	131.6
Feb-05	194.2	13.0	28.2	117.2	35.8	63.0	112.10	103.3	131.9
Mar-05	194.3	12.9	28.0	117.7	35.7	63.6	111.90	102.4	132.3
Apr-05	193.2	13.0	28.0	117.4	34.8	62.9	112.10	100.8	132.4

Month-over-month growth rates

Apr-04	-0.4	-0.3	0.5	-0.5	-0.7	0.7	2.1	0.5	0.4
May-04	0.2	0.5	2.9	-0.3	-0.5	0.4	0.3	-0.5	0.2
Jun-04	-0.1	3.1	-3.1	0.4	-0.6	0.6	-0.4	-0.1	0.1
Jul-04	-0.2	-1.6	0.4	-0.5	0.8	-0.8	-0.3	-0.4	0.0
Aug-04	0.7	1.4	-1.1	0.4	2.8	-2.2	0.4	-1.2	-0.2
Sep-04	0.0	0.2	1.0	-0.4	0.6	2.8	0.5	1.1	0.2
Oct-04	-1.5	0.7	-0.7	-1.2	-3.6	-0.3	-1.4	0.0	0.2
Nov-04	1.4	-0.8	-0.6	1.7	3.2	0.6	0.5	1.3	0.2
Dec-04	0.7	-1.1	1.5	0.5	1.7	0.8	1.0	0.1	1.0
Jan-05	-0.3	1.3	0.0	-0.2	-1.3	-2.4	-4.4	0.6	-0.2
Feb-05	-0.2	-1.2	1.9	-0.6	0.1	1.3	0.2	-0.7	0.2
Mar-05	0.1	-0.8	-0.6	0.4	-0.2	0.6	-0.2	-0.9	0.3
Apr-05	-0.6	0.7	0.1	-0.3	-2.6	-0.7	0.2	-1.6	0.1

¹Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

²Source: Pannell Kerr Forster and BC Stats

³Occupancy Rate change expressed as percentage point change

⁴No identifiable seasonality

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns ¹					
	Receipts (\$ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services

Annual data

2000	5,079.6	505.8	4,574.1	32,568.0	2,487.5	30,080.5
2001	5,317.2	533.7	4,783.5	33,743.3	2,602.8	31,140.5
2002	5,403.0	546.2	4,856.8	34,527.9	2,610.2	31,917.7
2003	5,654.4	584.9	5,069.5	35,043.2	2,626.9	32,416.4
2004	5,969.2	625.0	5,344.1	36,670.1	2,707.4	33,962.7

Annual growth rates

2000	5.3	5.3	5.2	6.9	4.3	7.2
2001	4.7	5.6	4.6	3.6	4.6	3.5
2002	1.6	2.3	1.5	2.3	0.3	2.5
2003	4.7	7.1	4.4	1.5	0.6	1.6
2004	5.6	6.9	5.4	4.6	3.1	4.8

Monthly data

Apr-04	492	52	440	3,048	223	2,825
May-04	495	52	442	3,060	228	2,832
Jun-04	497	53	445	3,056	229	2,827
Jul-04	491	52	438	3,047	232	2,815
Aug-04	497	51	446	3,109	223	2,886
Sep-04	505	52	454	3,070	223	2,846
Oct-04	506	53	452	3,066	226	2,840
Nov-04	529	52	476	3,159	219	2,940
Dec-04	498	52	446	3,029	225	2,803
Jan-05	524	53	471	3,178	227	2,951
Feb-05	546	50	496	3,225	224	3,001
Mar-05	528	43	485	3,144	229	2,915
Apr-05	538	44	494	3,134	227	2,907

Month-over-month growth rates

Apr-04	-0.1	-0.2	0.0	-0.1	-0.4	0.0
May-04	0.6	0.8	0.6	0.4	2.4	0.2
Jun-04	0.6	1.0	0.5	-0.1	0.1	-0.2
Jul-04	-1.3	-0.9	-1.4	-0.3	1.3	-0.4
Aug-04	1.2	-2.9	1.7	2.1	-3.8	2.5
Sep-04	1.7	2.1	1.7	-1.3	0.3	-1.4
Oct-04	0.0	2.8	-0.3	-0.1	1.2	-0.2
Nov-04	4.5	-2.3	5.3	3.0	-3.1	3.5
Dec-04	-5.8	-0.5	-6.4	-4.1	2.9	-4.6
Jan-05	5.2	1.4	5.6	4.9	0.7	5.3
Feb-05	4.2	-5.4	5.3	1.5	-1.3	1.7
Mar-05	-3.1	-12.7	-2.2	-2.5	2.4	-2.9
Apr-05	1.8	0.2	1.9	-0.3	-0.9	-0.3

¹Source: Statistics Canada & BC Stats.

NUMBER

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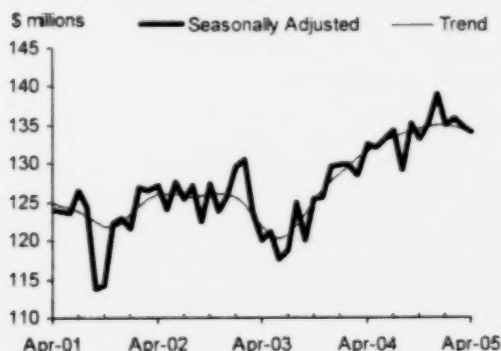
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Tourism Sector Monitor ♦ July 2005

Room Revenue

Provincial room revenues edged down for the second straight month in April (-0.5%, *seasonally adjusted*), due mainly to weakness in Vancouver Island/Coast (-2.2%) and Northeast (-16.3%), where temporary accommodations for workers were not as busy. Mainland/Southwest (+0.4%), Kootenay (+3.1%), and Cariboo (+11.9%) were the only regions that saw room revenue increase.

Room revenues continued to inch down



Among accommodation types, only hotels with 151-250 rooms (+3.6%) and motels (+1.5%) posted gains in April.

Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type			
	Apr 05 (\$000)	Mar 05 (\$000)	% change
Total	134,029	134,754	-0.5
Hotels	97,554	99,548	-2.0
Motels	18,053	17,789	1.5
Other Acc.	16,083	18,191	-11.6
Regions (Top 3 performers)			
Cariboo	4,697	4,197	+11.9
Kootenay	6,214	6,029	+3.1
Mainland/Southwest	69,480	69,194	+0.4

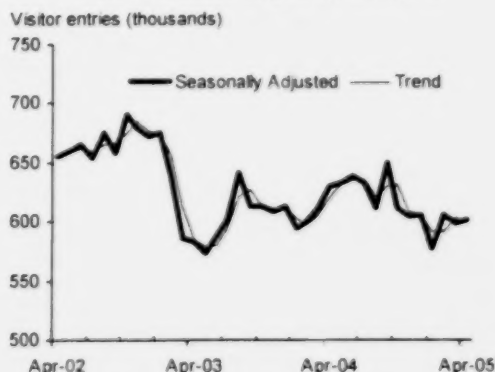
The biggest decline was recorded in the vacation rental category (-15.6%). Again, this is probably related to less activity at work camps. Large hotels (251+ rooms, -5.6%) and miscellaneous accommodations (including fishing lodges, bed and breakfast and other short term accommodations, -6.5%) also experienced a substantial drop in room revenues.

Visitor Entries

The number of visitors entering Canada via BC border crossings edged up in April (+0.4% *seasonally adjusted*), largely due to an increase in visits from overseas (+3.4%). Entries from the US slipped (-0.4%), with a decrease in same-day cross border excursions (-1.4%) partially offset by a modest gain in overnight visits (+0.7%).

The overall increase in Asian visitor entries (+3.3%) was largely due to extra visitors from Hong Kong (+33.3%) and Japan (+2.3%). European entries stalled in April (+0.1%) with fewer travellers from both the UK (-3.2%) and Germany (-0.3%). Entries from Australia, New Zealand and the South Pacific fell 0.7%.

Visitor entries edged up in April



The number of Canadians travelling abroad slumped 5.3% in April, as fewer Canadians made same-day trips to the US (-8.2%).

Table 2. Traveller Entries
(seasonally adjusted)

	Apr-05 (⁰⁰⁰)	Mar-05 (⁰⁰⁰)	% chg from Mar-05
American visitors			
Total	473	475	-0.4
Same-day	192	195	-1.4
Overnight	285	283	0.7
Overseas visitors			
Total	128	124	3.4
Europe	42	42	0.1
UK	19	20	-3.2
Asia	66	63	3.3
Japan	21	21	2.3
Taiwan	8	9	-5.5
Oceania	12	12	-0.7

Note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Other Indicators

Other tourism indicators gave mixed signals in April.

The consumer price index for traveller accommodation (-1.6%) fell for the third consecutive month. In the hotel industry, however, room prices were up 1.0%. The occupancy rate in BC hotels slipped 0.5 percentage points. Employment in the accommodation sector rose 0.9% after slipping 0.6% in March.

The restaurant food price index edged up (+0.2%), and restaurant, caterer and tavern receipts rose 2.8% in April. Revenues were up at both food services (+2.8%) and drinking places (+2.8%). However, employment in the food & beverage services sector fell 1.0%.

Transportation indicators were relatively weak in April. Passenger traffic dropped 0.5% at the Vancouver Airport and 2.2% at the Victoria airport. The Coquihalla highway was not as busy (-1.4%), and both

vehicle (-0.5%) and passenger (-0.1%) volumes aboard BC Ferries were off.

The Canadian dollar depreciated 1.3 US cents to 0.809 US dollar in April. While a weak Canadian dollar is expected to help BC's tourism sector, the depreciation in April might be too small to have any meaningful effect.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Apr-05	Change from Mar-05
Hotel Industry		
Occupancy rate	63.3	-0.5 pp.
Average room charge (Pamell Kerr Forster)	113.00	1.0%
Airport Passengers (000s) (%)		
Vancouver International Airport		
Total traffic	1,376	-0.5
US (trans-border)	345	-1.7
Other International	344	3.9
Canada (domestic) (YVR)	687	-2.0
Victoria International Airport		
Total traffic (Victoria Airport Authority)	110	-2.2
Restaurant Receipts (\$ millions) (%)		
All establishments	546	2.8
Food service	501	2.8
Drinking places (Statistics Canada)	45	2.8
Transportation (000s) (%)		
Coquihalla Highway		
Passenger Vehicles (Ministry of Transportation & Highways)	222	-1.4
BC Ferries		
Vehicle Volume	721	-0.5
Passenger Volume (BC Ferries)	1,846	-0.1
Exchange Rates Cdn \$		
US \$	0.809	-0.01
UK Pound	0.427	0.00
Japanese Yen	86.723	0.20
Australian \$ (Statistics Canada)	1.046	0.00

Note: pp. percentage points

Note to readers: all data in the *Tourism Sector Monitor* are reported on a seasonally adjusted basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues rebounded (+3.0%, *seasonally adjusted*) in May, as six out of eight regions posted month-over-month gains.

Province-wide, revenues were up for every type of tourism establishment. Non-standard accommodation (including fishing lodges, bed and breakfast and other short term accommodations, +20.1%), vacation rentals (+15.4%) and large hotels (251+ rooms, +8.9%) experienced exceptionally strong gains.

Visitor entries rose 4.1% (*seasonally adjusted*) in May. This was a result of an increase in the number of US visitors (+4.4%) as well as overseas travellers (+2.8%).

Vancouver airport (+2.0%) was busier in May than in the previous month. Victoria airport (-0.7%), however, reported less activity. There were more passengers (+1.2%) and vehicles (+0.7%) aboard BC Ferries.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

Special Focus: What Drives US Visitors Away?

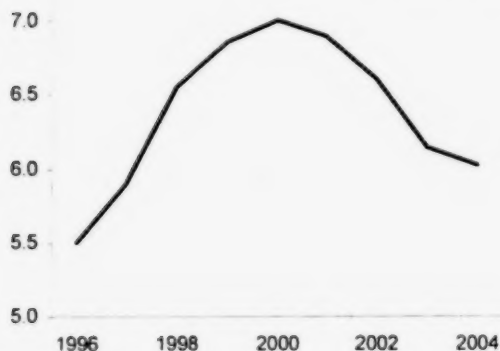
American visitors comprise the biggest client base for British Columbia's tourism sector. However, the number of US travellers coming to Canada via BC has declined over the last a few years. This paper examines some of the reasons behind these declines, using linear regression models to analyze how different factors may affect the number of US visitor entries.

US Travellers Going South or Overseas

The number of US travellers coming to Canada via BC began to decline in 2001 and has fallen every year since then¹. The downturn predated the events of 9/11, but was exacerbated by them, and subsequent issues such as the SARS outbreak and, to a lesser extent, the war in Iraq.

Annual Number of US Visitors Entering BC

7.5 million



Data Source: Statistics Canada

According to the US Office of Travel & Tourism Industries (OTTI)², the number of US residents coming to Canada plummeted (-12.3%) in 2003, while US trips to Mexico only dropped 5.1%. During the same period, however, overseas destinations welcomed 4.5% more US visitors.

¹ -1.6% in 2001; -4.3% in 2002; -7.0% in 2003; -1.9% in 2004; Source: Statistics Canada

² <http://tinet.ita.doc.gov/>

As Americans are a significant driving force in BC's tourism economy, a change of interest towards overseas markets could have a huge impact on the province's tourism sector.

What makes BC a less attractive destination for US travellers? There isn't much inconsistency in the services provided in BC, nor is there any unpleasant incident that keeps Americans from going North (except for SARS, which proved to have little impact in the following analysis). It seems a reasonable explanation could be the cost of travel to BC.

When people plan a vacation, there are several components that always have a price tag attached: transportation, accommodation, food and beverages, admissions and tickets, and souvenirs. Finding the relationships between the costs of these components and the number of US tourists may help explain the recent trend.

Regression

Linear regression models were used to estimate the relationship between the number of US visitors entering Canada via BC (same-day and overnight separately) with a list of variables, including average motor gasoline retail prices in the US to measure the cost of car transportation³, the US Air Travel Price Index (ATPI) to measure the cost of air transportation⁴, the BC hotel average room rate to measure the cost of accommodation⁵, and the monthly average US dollar to Canadian dollar exchange rate to measure the cost of all other travel expenses⁶. Dummy variables were also included to account for the effect of the Sep-

³ Energy Information Administration, US Department of Energy. (<http://eia.doe.gov>)

⁴ US Bureau of Transportation Statistics (www.bts.gov)

⁵ Pannell Kerr Forster Canada

⁶ Source: Statistics Canada

tember 11th terrorist attack in 2001 and the SARS outbreak in 2003.

The regressions show that the above variables can explain 89% of the variation in the number of US same-day entries, and 84% of the variation in the number of US overnight trips. In other words, US travellers' diminishing interest in BC can be mostly attributed to these factors.

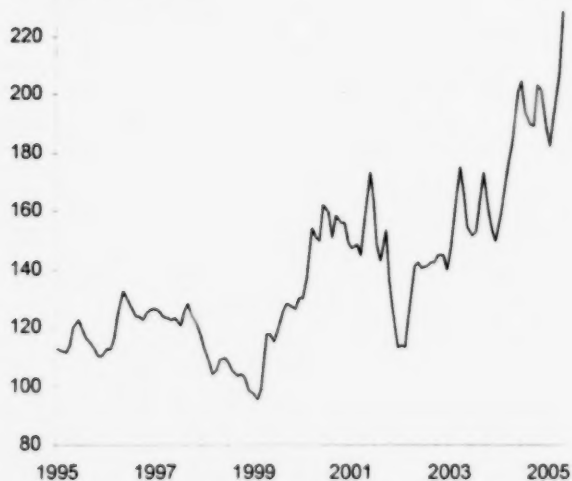
Gasoline Prices

Due to the proximity of the two countries, many US residents drive to Canada rather than taking public transportation, giving them a lower-cost means of transportation, and greater flexibility when they travel. Thus, retail gasoline prices play an important role when Americans decide whether to drive to Canada or stay closer to home.

The regression results showed that gasoline price is a significant factor for the numbers of both same-day and overnight visitor entries. One US cent of increase in average gas prices would prevent over 300 same-day and 200 overnight travellers from driving to BC every month.

US Average Motor Gasoline Retail Prices

240 cents per gallon



Data Source: US Department of Energy

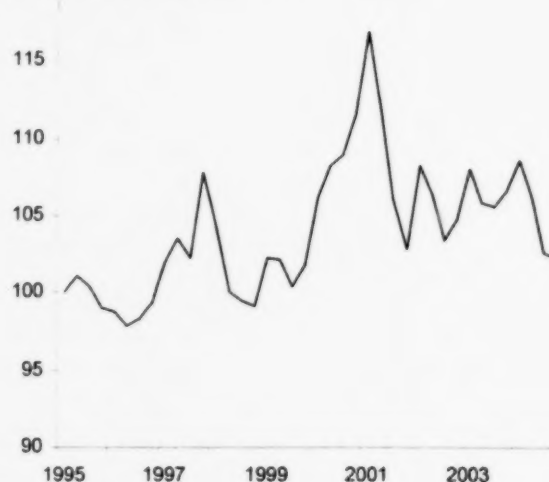
Gasoline prices have been skyrocketing since the beginning of 2002, and there is still no sign of relief. The US average gasoline price in April 2005 was US\$2.28, more than twice as much as the price in January 2002 (US\$1.13). Thus, gas prices are likely to affect the number of US visitors negatively for quite a while.

Airfares

Airplane tickets comprise another big portion of total travel costs. When people are making travel plans, air tickets are probably among the first things they consider, especially for overseas or distant destinations.

US Air Travel Price Index

120 1995 Q1=100



Data Source: US Bureau of Transportation Statistics

A rise (or drop) in airfares can be a double-edged sword for the Canadian tourism market. First, the more expensive air tickets to Canada are, the less likely US residents are to fly to Canada for vacation. On the other hand, higher airfares to Mexico or overseas would make those destinations less affordable and hence bring more Americans on visits to their northern neighbour. The regression showed that the second effect has prevailed in the past. In other words, the number of US visitors to BC is positively

related to average air travel prices. On average, one point increase in the Air Travel Price Index would bring over 600 more same-day US travellers to BC every month⁷.

Travellers' confidence, brutal competition, and cost cutting by airlines have all helped forge a downward trend in US airfares since 2001. According to the US Bureau of Transportation Statistics, the US origin air travel price index (ATPI, 1995 Q1=100) dropped from 117 in the first quarter of 2001 to 102 in the fourth quarter of 2004.

Exchange Rates

The exchange rate between the US and Canadian dollar is another, if not the most, important factor for American travellers. With the Canadian dollar appreciating, transportation to and within British Columbia, accommodation, meals, and all other expenses in the province become less of a bargain for visitors from the US.

In October 2003, BC STATS evaluated the impact of US dollar to Canadian dollar exchange rate (Cda\$/per US\$) movements on cross-border travel. The conclusion was that variations in the value of the US dollar have positive impacts on the number of both same-day and overnight trips by Americans to BC. This conclusion was also confirmed by this study. The regression results showed that if the US dollar appreciates by one cent relative to the loonie, approximately 1,200 more same-day and 1,100 more overnight US visitors would come to BC every month, and vice versa.

During the period from January 2002 to December 2004 when the value of the US Dollar dropped 23.8% (from 1.60 to 1.22 Cda\$/per US\$), the number of same-day US visitors to BC slumped 12.8% and the number of overnight entries dropped 8.0%.

⁷ The Air Travel Price Index is not a significant explanatory variable for over-night travels

Exchange Rate vs. US Same-day Entries



Data Source: Statistics Canada

Of course, many factors contributed to this trend. In addition to gasoline and air travel prices, the September 11th terrorist attack and the SARS outbreak also affected travel to BC.

9/11 and SARS

To separate and identify the impact of the September 11th terrorist attack and the SARS outbreak on US visitor entries, two dummy variables were included in the models.

The regression suggested that 9/11 had a huge negative impact on US same-day and overnight visitor entries. Without the events of 9/11, there would have been 88,700 more same-day and 16,800 more overnight US visitors to BC in each month since September 2001.

The impact of the SARS outbreak, on the other hand, was not as strong. Since visitor entries recovered fairly quickly after the outbreak, the regression did not recognize SARS as a significant explanatory variable for the number of US visitors.

Monthly US Visitor Entries to BC

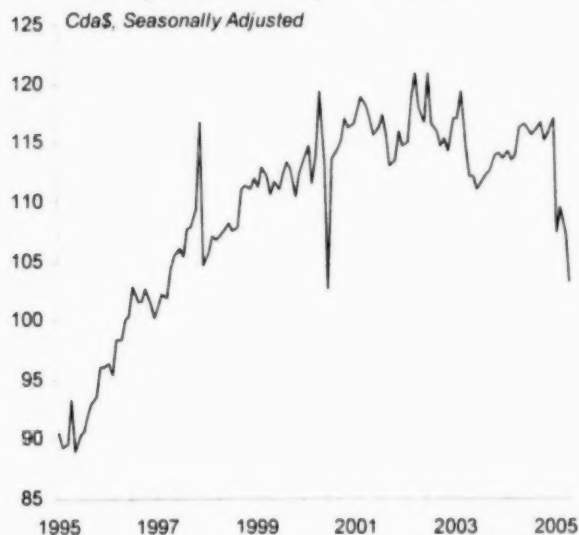


Data Source: Statistics Canada & BC STATS

Accommodations

Initially, average room rates of BC hotels were included in the regression model for overnight US visitor entries, as accommodation also claims a big chunk of travel expenditure. However, no significant relationship was found between hotel prices and the number of US overnight visitors.

Daily Room Rate of BC Hotels



Data Source: Pannell Kerr Forster Canada & BC STATS

The fact that BC's room rates do not appear to affect the decision making process of Americans is not necessarily a bad thing for BC's accommodation industry. It implies that BC's hotel rooms were priced within an equilibrium range so that they were neither too expensive to scare Americans away nor cheap enough to lure more of them to come over.

It is also possible that instead of influencing overnight US visitor entries, hotel room prices might affect the length of their stay in BC. However, due to the lack of data, this hypothesis was not verified in this study.

Are they coming back?

Our research revealed the main reasons behind the downward trend in the numbers of US visitors coming to BC. The trend was established under the pressure of higher gasoline prices, lower fares to alternative destinations, a lower value of the US dollar, and residual impact of September 11th. But what can we expect to see in the next little while?

High gasoline prices aren't likely to fall back any time soon, especially when OPEC crude oil prices keep ratcheting up to new record levels (US\$54.4 per barrel in July 15, 2005⁸).

US air travel prices are very likely to stay low or go down further, especially after the possible merger of US Airways, American's seventh-largest airline, and America West Airlines. This \$1.5 billion merger deal would create the US's largest budget airline. Together with the already successful low-fare airline-JetBlue, they will bring the airfare war to a new level.

The movement of Canadian dollars against US dollars depends on how both economies perform and many other unpredictable fac-

⁸ Energy Information Administration, US Department of Energy. (<http://eia.doe.gov>)

tors. But one thing is certain: even if the high Canadian dollar starts to fall, the process will take a fair amount of time. And during that period, the exchange rate will keep affecting BC's tourism sector negatively.

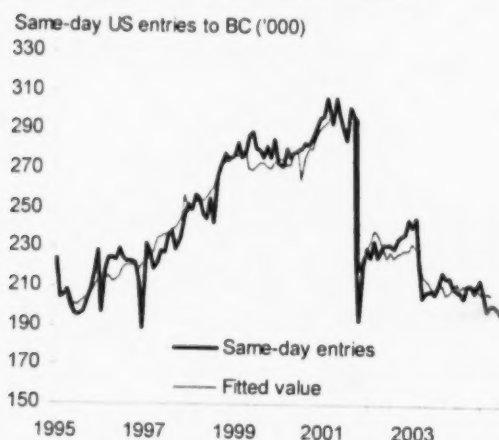
It has been almost four years since the Sept. 11th terrorist attack, but the number of US visitors to BC has not yet fully recovered. It is difficult to guess how much longer it will affect tourism in BC, but with the recent serial booming in London, the confidence of US tourists certainly needs more time to heal.

In general, most of the factors identified have been slowing travel from the US to BC in the last several years, and it seems likely that these factors will remain a drag on the tourism sector for quite a while.

Models and Charts

Same-day US visitor entries

of Same-day Trips = 12,053 - 88,671 *
Sept_11 + 120,485 * exchange rate - 330 * gas
prices + 626 * air fare + 1074 * trend



Dependent Variable: Same-day US entries				
Variable	Coefficient	Std. Error	t-Statistic	Prob.
C	12053	37333.39	0.32	0.75
9/11	-88671	4375.91	-20.26	0.00
Exchange rate	120485	16760.99	7.19	0.00
Gas price	-330	85.93	-3.84	0.00
ATPI	626	353.73	1.77	0.08
@TREND	1074	90.58	11.86	0.00
R-squared	0.889	Durbin-Watson stat		1.230
Adjusted R-squared	0.884	Prob(F-statistic)		0.000

Overnight US visitor entries

of overnight trips = 109,791 - 16,816 *
Sept_11 + 106,733 * exchange rate - 212 * gas
price + 903 * trend



Dependent Variable: Overnight US entries				
Variable	Coefficient	Std. Error	t-Statistic	Prob.
C	109792	26485.77	4.15	0.00
9/11	-16816	4005.55	-4.20	0.00
Exchange rate	106733	14802.56	7.21	0.00
Gas price	-213	80.28	-2.65	0.01
@TREND	903	81.00	11.15	0.00
R-squared	0.848	Durbin-Watson stat		1.145
Adjusted R-squared	0.843	Prob(F-statistic)		0.000

Major Variables Used

	2000	2001	2002	2003	2004
US Visitor Entries Via BC ('000)					
Same-day	3,407.1	3,257.7	2,808.1	2,580.7	2,468.0
Overnight	3,598.8	3,636.8	3,787.8	3,556.7	3,571.1
Annual Average Exchange rates (Cda\$/per US\$)					
	1.49	1.55	1.57	1.40	1.30
Average US Motor Gasoline Retail Prices (US Cents per Gallon)					
	151.0	146.1	135.8	159.1	188.0
US Air Travel Price Index (1995Q1=100)					
	108.7	109.4	105.7	106.5	104.9
BC Hotel Average Daily Room Rate (Cda\$)					
	114.0	116.1	117.0	113.7	115.6

Table 1: Room Revenue by Development Region (\$000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,244	863,420	229,533	76,892	46,181	20,127	8,811	51,889	1,592,097

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	3.9	-1.3	12.2	7.1

Monthly data

Apr-04	24,006	73,116	18,554	6,562	3,595	1,713	804	4,072	132,421
May-04	23,801	73,230	19,131	6,173	3,643	1,656	733	3,737	132,103
Jun-04	24,307	73,477	18,842	6,282	3,770	1,704	740	4,013	133,134
Jul-04	24,580	73,483	19,310	6,515	3,779	1,752	737	4,129	134,286
Aug-04	24,478	69,883	18,353	6,183	3,835	1,719	720	4,081	129,252
Sep-04	25,087	73,855	19,255	6,470	3,821	1,655	768	4,361	135,273
Oct-04	24,692	71,558	19,096	6,286	3,913	1,704	738	5,285	133,273
Nov-04	25,219	71,708	19,987	6,505	3,952	1,740	760	5,262	135,132
Dec-04	26,188	74,174	20,318	6,261	4,749	1,541	787	4,852	138,870
Jan-05	26,114	70,948	20,342	6,217	3,895	1,617	846	5,026	135,006
Feb-05	25,637	70,211	20,953	6,118	4,236	1,684	1,030	6,070	135,939
Mar-05	26,725	69,194	21,260	6,029	4,197	1,693	1,002	4,654	134,754
Apr-05	26,144	69,480	21,013	6,214	4,697	1,653	934	3,895	134,029

Month-over-month growth rates

Apr-04	1.7	4.8	-1.3	3.5	-6.3	11.6	35.0	-1.5	3.0
May-04	-0.9	0.2	3.1	-5.9	1.3	-3.3	-8.9	-8.2	-0.2
Jun-04	2.1	0.3	-1.5	1.8	3.5	2.9	0.9	7.4	0.8
Jul-04	1.1	0.0	2.5	3.7	0.3	2.8	-0.3	2.9	0.9
Aug-04	-0.4	-4.9	-5.0	-5.1	1.5	-1.9	-2.3	-1.2	-3.7
Sep-04	2.5	5.7	4.9	4.6	-0.4	-3.7	6.7	6.9	4.7
Oct-04	-1.6	-3.1	-0.8	-2.8	2.4	2.9	-3.9	21.2	-1.5
Nov-04	2.1	0.2	4.7	3.5	1.0	2.1	2.9	-0.4	1.4
Dec-04	3.8	3.4	1.7	-3.7	20.1	-11.4	3.6	-7.8	2.8
Jan-05	-0.3	-4.3	0.1	-0.7	-18.0	5.0	7.5	3.6	-2.8
Feb-05	-1.8	-1.0	3.0	-1.6	8.8	4.1	21.7	20.8	0.7
Mar-05	4.2	-1.4	1.5	-1.4	-0.9	0.5	-2.7	-23.3	-0.9
Apr-05	-2.2	0.4	-1.2	3.1	11.9	-2.4	-6.8	-16.3	-0.5

April month-over-month percent growth

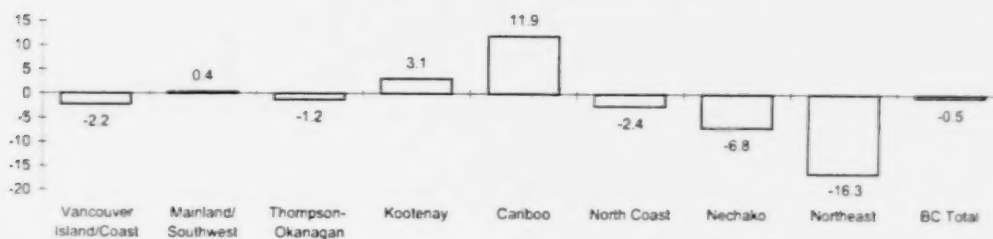


Table 2: Room Revenue by Accommodation Type (\$000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous Incl. Fishing Lodges
	251+	151-250	76-150	1-75			

Annual data

2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423
2004	467,620	198,608	321,679	185,692	195,041	124,433	98,824

Annual growth rates

2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
2004	6.8	9.8	8.2	6.6	7.5	4.1	3.6

Monthly data

Apr-04	40,392	15,629	26,815	15,289	15,837	10,547	8,281
May-04	40,321	16,417	26,910	15,427	15,926	10,144	7,970
Jun-04	40,186	16,700	26,889	15,540	16,092	10,113	8,078
Jul-04	38,941	16,519	27,164	15,810	16,478	10,368	8,463
Aug-04	37,791	16,338	26,161	15,402	15,454	10,305	8,264
Sep-04	40,395	17,067	27,230	15,903	16,292	10,622	8,677
Oct-04	37,353	16,653	27,057	16,056	16,497	11,289	8,296
Nov-04	37,722	17,738	28,125	15,731	17,729	11,193	8,546
Dec-04	42,653	17,343	27,229	15,531	17,233	11,308	8,306
Jan-05	38,941	16,603	27,108	14,999	16,541	11,289	7,951
Feb-05	38,334	16,991	27,520	15,744	17,389	10,735	8,074
Mar-05	38,265	17,044	27,647	16,592	17,789	10,135	8,056
Apr-05	36,118	17,655	27,426	16,354	18,053	8,551	7,532

Month-over-month growth rates

Apr-04	5.5	-4.3	2.7	3.0	-0.3	9.5	9.7
May-04	-0.2	5.0	0.4	0.9	0.6	-3.8	-3.8
Jun-04	-0.3	1.7	-0.1	0.7	1.0	-0.3	1.4
Jul-04	-3.1	-1.1	1.0	1.7	2.4	2.5	4.8
Aug-04	-3.0	-1.1	-3.7	-2.6	-6.2	-0.6	-2.3
Sep-04	6.9	4.5	4.1	3.3	5.4	3.1	5.0
Oct-04	-7.5	-2.4	-0.6	1.0	1.3	6.3	-4.4
Nov-04	1.0	6.5	3.9	-2.0	7.5	-0.8	3.0
Dec-04	13.1	-2.2	-3.2	-1.3	-2.8	1.0	-2.8
Jan-05	-8.7	-4.3	-0.4	-3.4	-4.0	-0.2	-4.3
Feb-05	-1.8	2.3	1.5	5.0	5.1	-4.9	1.6
Mar-05	-0.2	0.3	0.5	5.4	2.3	-5.6	-0.2
Apr-05	-5.6	3.6	-0.8	-1.4	1.5	-15.6	-6.5

April month-over-month percent growth

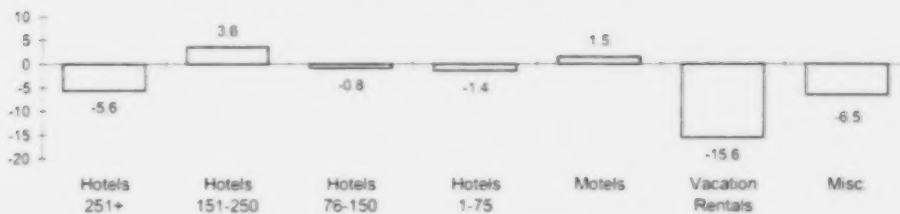


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Apr-05	YTD 05	Apr-04	YTD 04	Apr-05	Apr-04	Apr-05	Apr-04
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	13,276	39,436	15.2	12.9	167	12	8,295	424
Total - Hotels	11,188	33,270	15.8	12.1	68	3	5,608	330
76+ Rooms	8,634	25,694	15.0	11.2	26	1	3,937	236
1-75 Rooms	2,553	7,575	18.5	15.4	42	2	1,671	94
Motels	1,107	3,286	19.8	12.3	29	1	1,123	62
Vacation Rentals	315	964	-1.4	12.9	28	7	320	22
19 Cowichan Valley								
Total - All accommodation types	599	2,178	-4.1	13.0	33	0	648	8
Motels	132	529	-6.8	2.3	16	1	316	20
21 Nanaimo								
Total - All accommodation types	2,807	9,391	7.4	7.1	65	0	2,467	-4
Total - Hotels	1,509	5,171	5.7	4.3	19	0	1,174	-50
Motels	555	1,885	10.4	13.4	22	1	614	55
Vacation Rentals	641	2,000	12.1	7.3	18	0	557	-5
23 Alberni-Clayoquot								
Total - All accommodation types	2,252	7,893	-6.0	13.2	56	-2	1,332	-9
Motels	224	759	3.0	24.7	20	0	405	0
Vacation Rentals	897	3,180	7.2	30.9	13	1	326	40
25 Comox-Strathcona								
Total - All accommodation types	1,826	6,007	-1.2	-13.1	59	1	1,744	14
Motels	493	1,760	-8.2	-9.3	22	-2	593	-61
Vacation Rentals	86	356	-33.3	-56.4	14	1	185	30
27 Powell River								
Total - All accommodation types	-	-	-	-	16	1	356	25
43 Mount Waddington								
Total - All accommodation types	209	773	6.3	4.3	17	-1	554	-1
45 Central Coast								
Total - All accommodation types	-	-	-	-	8	0	92	-11
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	2,749	10,339	0.1	-0.9	64	2	2,405	-55
Total - Hotels	2,031	7,762	-3.4	1.3	18	-3	1,349	-81
Motels	598	1,986	5.9	16.2	35	0	913	0
15 Greater Vancouver								
Total - All accommodation types	47,811	162,636	6.9	5.6	228	2	25,852	-161
Total - Hotels	45,454	151,545	6.0	3.1	156	1	22,832	-301
251+ Rooms	24,977	81,422	2.9	0.1	24	-1	9,690	-266
151-250 Rooms	8,515	29,326	13.0	5.0	25	0	4,752	0
76-150 Rooms	8,914	30,813	4.8	7.9	52	-2	5,668	-181
1-75 Rooms	3,047	9,984	19.0	8.2	55	4	2,722	146
Motels	1,284	4,471	14.7	12.3	37	0	1,609	52
Vacation Rentals	744	5,425	52.1	164.8	17	1	664	88
29 Sunshine Coast								
Total - All accommodation types	331	913	20.0	5.4	21	-1	378	-4
31 Squamish-Lillooet								
Total - All accommodation types	9,283	88,464	-41.1	-12.0	99	3	7,579	462
Total - Hotels	7,863	70,686	-38.5	-11.6	47	3	5,788	375
151+ Rooms	5,237	48,366	-37.9	-7.9	11	1	3,429	272
76-150 Rooms	2,018	17,338	-38.7	-15.8	16	1	1,604	85
1-75 Rooms	609	4,983	-42.8	-27.2	20	1	755	18
Vacation Rentals	956	13,198	-55.4	-11.7	28	1	1,238	43
Miscellaneous	304	4,124	-55.0	-20.4	15	-1	336	44
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	2,052	6,582	4.5	6.8	95	-5	2,892	-111
Total - Hotels	1,200	3,600	1.3	-5.4	15	-1	1,074	-85
Motels	748	1,980	11.3	10.6	65	-4	1,574	-60

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Apr-05	YTD 05	Apr-04	YTD 04	Apr-05	Apr-04	Apr-05	Apr-04
33 Thompson-Nicola								
Total - All accommodation types	3,800	18,200	7.4	4.3	138	-1	5,253	-63
Total - Hotels	2,064	7,755	9.0	3.0	36	0	2,241	-8
76+ Rooms	1,711	6,381	8.6	2.1	12	0	1,388	-1
1-75 Rooms	353	1,374	11.3	7.2	24	0	853	-7
Motels	1,345	3,901	11.5	7.4	75	0	2,270	-8
Vacation Rentals	179	5,278	-18.2	2.0	11	0	400	0
35 Central Okanagan								
Total - All accommodation types	4,370	20,115	2.6	18.7	61	2	3,560	7
Total - Hotels	3,269	12,824	5.8	16.1	22	1	1,916	4
76+ Rooms	2,895	10,319	5.7	11.5	11	0	1,477	0
1-75 Rooms	374	2,504	6.4	39.5	11	1	439	4
Motels	796	2,317	-5.2	-2.3	23	-2	1,073	-54
Vacation Rentals	187	4,730	-24.7	41.4	12	2	395	32
37 North Okanagan								
Total - All accommodation types	1,280	7,684	40.2	15.4	42	-2	1,590	-73
Total - Hotels	719	5,182	38.7	15.9	15	0	824	0
Motels	537	1,539	49.6	20.0	18	-1	578	-64
39 Columbia-Shuswap								
Total - All accommodation types	2,003	9,964	-0.2	11.4	90	0	2,920	16
Total - Hotels	880	3,695	7.0	8.1	18	1	1,032	12
Motels	722	2,811	-5.1	3.5	43	-2	1,430	-81
Miscellaneous	352	3,026	-5.7	22.1	23	0	385	76
Kootenay								
01 East Kootenay								
Total - All accommodation types	3,170	18,611	-8.1	-8.8	109	3	4,500	275
Total - Hotels	1,205	6,877	3.3	7.1	26	1	1,535	21
Motels	716	2,533	6.8	-1.9	49	0	1,159	-4
Vacation Rentals	617	4,790	-21.2	-23.5	15	0	944	20
03 Central Kootenay								
Total - All accommodation types	1,312	4,737	11.9	6.5	67	-3	1,497	-4
Total - Hotels	767	2,647	9.7	6.7	17	2	738	43
Motels	354	1,113	30.6	22.5	28	0	517	-2
Miscellaneous	106	683	-23.1	-19.5	11	-3	139	-40
05 Kootenay Boundary								
Total - All accommodation types	339	1,795	-11.4	-9.0	31	0	582	-61
Motels	198	723	-13.2	-10.0	22	0	370	0
Cariboo								
41 Cariboo								
Total - All accommodation types	1,382	3,974	26.4	11.0	64	-3	1,777	-8
Motels	839	2,392	33.4	15.8	36	0	1,049	25
53 Fraser-Fort George								
Total - All accommodation types	2,831	9,056	32.9	19.3	49	0	2,460	70
Total - Hotels	2,139	6,737	38.8	21.5	19	1	1,474	82
Motels	644	1,988	21.7	19.8	27	0	943	-8
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	411	1,640	-11.4	-8.3	31	-2	986	-12
Motels	81	382	-32.9	-20.8	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	602	2,268	1.5	6.4	32	2	803	34
Motels	223	840	0.6	12.7	17	1	402	23
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	637	2,630	16.9	36.5	40	-2	1,020	-78
Motels	375	1,367	24.4	24.2	24	0	625	-14
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	3,518	26,100	-3.9	24.4	64	-4	2,879	-650
Total - Hotels	1,914	10,445	39.6	13.6	23	1	1,579	40
Motels	985	4,698	28.0	20.3	32	-1	883	-41

.. Data for regions with fewer than 10 properties reporting can not be released.

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Apr-05	YTD 05	Apr-04	YTD 04	Apr-05	Apr-04	Apr-05	Apr-04
Vancouver Island/Coast	21,243	66,658	9.0	7.9	419	11	15,480	438
Victoria (C)	10,988	32,509	17.8	13.0	79	5	5,741	454
Other CRD	1,661	4,916	-6.1	4.0	79	6	2,232	-63
Nanaimo (C)	1,694	5,762	18.2	10.5	22	2	1,211	74
Port Alberni (C)	245	1,009	19.9	29.0	12	0	328	-7
Courtenay (C)	725	2,410	13.0	-3.0	13	2	498	45
Rest of Development Region	5,930	20,052	-3.0	1.1	227	-2	5,470	-65
Mainland/Southwest	60,174	262,351	-5.2	-1.3	412	6	36,214	240
Downtown Vancouver (C)	30,641	97,612	5.5	2.1	86	3	12,942	76
Other Vancouver (C)	2,618	11,436	31.0	59.1	31	0	2,831	144
Richmond (C)	7,337	27,872	14.2	5.4	23	0	4,301	-20
Burnaby (C)	2,004	6,852	-22.6	-5.2	11	-1	1,357	337
Other GVRD	5,210	18,864	11.5	7.5	77	0	4,421	-83
Whistler (DM)	8,750	86,038	-42.6	-12.6	73	0	6,832	271
Rest of Development Region	3,613	13,677	2.4	2.4	111	4	3,530	-485
Thompson/Okanagan	13,505	62,466	6.4	11.4	426	-7	16,215	-229
Penticton (C)	1,301	3,950	9.4	-2.9	40	-3	1,598	-150
Kamloops (C)	2,952	15,042	4.0	2.1	62	-1	3,567	-30
Kelowna (C)	4,008	19,079	2.3	19.6	49	-1	3,096	-9
Vernon (C)	1,216	7,548	42.3	15.8	33	-1	1,457	-61
Revelstoke (C)	794	4,125	-8.9	-0.8	25	-1	980	-40
Rest of Development Region	3,233	12,721	7.0	19.1	217	0	5,517	61
Kootenay	4,820	25,143	-3.7	-6.3	207	0	6,579	210
Cranbrook (C)	733	2,149	42.4	14.5	16	0	758	0
Nelson (C)	450	1,670	-3.7	-5.7	12	0	425	2
Rest of Development Region	3,638	21,323	-9.6	-8.0	191	0	5,821	210
Cariboo	4,213	13,030	30.7	16.6	113	-3	4,237	62
Quesnel (C)	417	1,050	19.1	9.4	13	0	452	0
Williams Lake (C)	456	1,312	30.4	18.8	11	1	534	32
Prince George (C)	2,360	7,207	37.9	22.2	27	1	1,746	74
Rest of Development Region	979	3,461	20.7	7.8	62	-5	1,505	-44
North Coast	1,013	3,908	-4.1	-0.3	63	0	1,789	22
Prince Rupert (C)	338	1,393	-7.6	-5.9	16	0	773	0
Terrace (C)	389	1,378	4.0	6.8	12	0	413	0
Rest of Development Region	286	1,137	-9.8	-1.1	35	0	603	22
Nechako	637	2,630	16.9	36.5	40	-2	1,020	-78
Smithers (T)	342	1,503	24.6	61.6	13	1	422	25
Rest of Development Region	296	1,127	9.2	13.1	27	-3	598	201
Northeast	3,518	26,100	-3.9	24.4	64	-4	2,879	-650
Dawson Creek (C)	553	2,875	56.8	39.1	13	0	471	-13
Fort St. John (C)	1,252	12,339	34.6	5.6	17	-2	993	-55
Rest of Development Region	1,713	10,887	-28.0	50.7	34	-2	1,415	-582

* Data for regions with fewer than 10 properties reporting can not be released.

Table 5: Historical Unadjusted Room Revenue by Development Region (\$000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,244	863,420	229,533	76,892	46,181	20,127	8,811	51,889	1,592,097

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	3.9	-1.3	12.2	7.1

Monthly data

Apr-04	19,495	63,507	12,696	5,004	3,223	1,056	545	3,660	109,186
May-04	25,608	71,529	18,051	4,761	3,831	1,504	652	2,397	128,334
Jun-04	31,380	81,605	21,957	5,917	4,699	2,786	984	3,231	152,559
Jul-04	44,238	98,089	37,609	9,647	5,481	3,434	1,051	3,896	203,445
Aug-04	49,430	101,817	37,115	10,120	6,109	3,253	1,100	4,029	212,973
Sep-04	35,179	81,870	23,602	7,603	5,234	2,334	1,172	4,075	161,067
Oct-04	20,981	55,010	13,961	4,252	3,996	1,251	886	5,132	105,468
Nov-04	13,405	43,212	8,484	2,886	2,856	959	570	4,183	76,555
Dec-04	13,224	64,448	12,659	4,875	2,804	685	469	3,971	103,134
Jan-05	11,280	61,240	13,149	5,700	2,447	729	486	5,918	100,949
Feb-05	14,441	68,394	16,491	7,348	2,830	1,027	666	9,235	120,431
Mar-05	19,694	72,544	19,321	7,274	3,540	1,139	841	7,430	131,784
Apr-05	21,243	60,174	13,505	4,820	4,213	1,013	637	3,518	109,123

Year-over-year percent changes

Apr-04	5.9	14.1	6.7	15.2	1.0	5.0	7.0	4.8	10.8
May-04	4.7	11.6	10.5	1.7	1.3	4.3	-2.1	-2.2	8.8
Jun-04	9.0	17.0	2.6	5.0	4.8	6.8	6.0	12.0	11.8
Jul-04	12.4	13.9	14.4	11.6	6.0	10.7	-0.7	3.6	13.0
Aug-04	5.2	0.6	0.2	1.5	9.7	4.7	-3.6	1.3	1.9
Sep-04	11.8	12.8	17.9	14.1	9.6	-0.2	7.4	15.2	13.1
Oct-04	5.4	5.2	1.2	0.2	5.9	3.7	-8.0	48.5	5.9
Nov-04	5.1	4.3	5.5	16.2	8.9	6.2	5.9	41.0	6.7
Dec-04	12.4	8.6	8.6	-3.0	27.5	-17.5	3.4	4.4	8.5
Jan-05	3.6	2.9	5.0	-3.0	7.5	-7.8	17.1	33.7	4.4
Feb-05	2.2	-0.1	9.3	-10.2	15.5	-0.6	45.0	46.0	3.7
Mar-05	13.9	-2.4	22.4	-6.4	9.8	9.6	65.8	13.2	4.1
Apr-05	9.0	-5.2	6.4	-3.7	30.7	-4.1	16.9	-3.9	-0.1

April year-over-year percent change

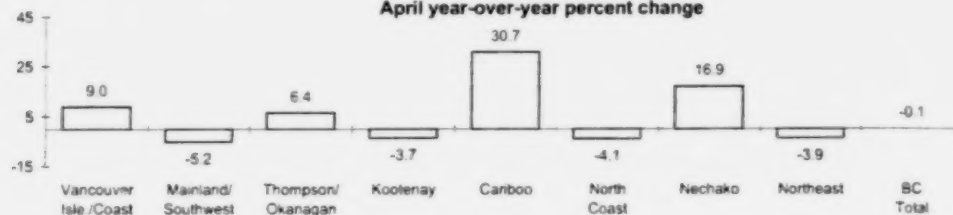


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**

Annual data

2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,970.8	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.8	118.0
2003	7,335.3	6,137.4	2,580.7	3,556.7	1,197.8	577.6	410.1	124.8
2004	7,423.9	6,020.7	2,468.0	3,571.1	1,403.2	715.8	458.1	144.3

Annual percent changes

2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.1	-4.3	-13.8	4.2	-3.0	4.4	-11.7	-10.5
2003	-8.0	-7.0	-8.1	-6.1	-12.9	-24.4	-0.4	5.8
2004	1.2	-1.9	-4.4	0.4	17.1	23.9	11.7	15.6

Monthly data

May-04	632.3	506.0	205.7	295.2	126.3	66.0	38.8	12.7
Jun-04	638.8	511.9	213.5	296.9	126.9	67.8	39.2	12.7
Jul-04	632.9	510.3	206.6	300.8	122.5	60.1	41.8	12.6
Aug-04	611.3	494.0	198.1	294.9	117.3	56.2	38.7	12.5
Sep-04	649.6	529.7	201.1	310.6	119.8	58.3	40.4	12.6
Oct-04	612.0	493.7	201.5	294.8	118.3	58.3	39.7	11.7
Nov-04	604.6	492.8	200.2	297.9	111.8	56.0	36.0	12.0
Dec-04	606.1	491.0	197.7	292.8	115.0	55.5	39.3	12.1
Jan-05	577.9	463.0	179.5	288.6	114.9	54.7	40.4	12.2
Feb-05	606.0	484.1	198.1	289.9	122.0	61.3	40.5	12.5
Mar-05	599.2	475.5	194.7	283.1	123.7	63.4	42.1	12.2
Apr-05	601.3	473.4	192.0	285.1	127.8	65.5	42.1	12.1
May-05	625.6	494.2	200.5	296.8	131.4	64.8	42.9	15.4

Month-over-month growth rates

May-04	0.3	-1.1	-3.6	-3.3	6.3	4.6	4.9	4.3
Jun-04	1.0	1.2	3.8	0.6	0.5	2.7	1.1	0.2
Jul-04	-0.9	-0.3	-3.3	1.3	-3.4	-11.4	6.5	-0.4
Aug-04	-3.4	-3.2	-4.1	-2.0	-4.3	-6.5	-7.3	-1.0
Sep-04	6.3	7.2	1.5	5.3	2.2	3.8	4.4	0.4
Oct-04	-5.8	-6.8	0.2	-5.1	-1.3	0.1	-1.8	-7.1
Nov-04	-1.2	-0.2	-0.7	1.0	-5.4	-4.0	-9.2	3.2
Dec-04	0.2	-0.3	-1.2	-1.7	2.9	-1.0	8.9	0.7
Jan-05	-4.6	-5.7	-9.2	-1.5	-0.1	-1.5	3.0	0.9
Feb-05	4.9	4.5	10.4	0.5	6.1	12.1	0.2	2.1
Mar-05	-1.1	-1.8	-1.7	-2.3	1.4	3.4	3.9	-2.4
Apr-05	0.4	-0.4	-1.4	0.7	3.4	3.3	0.1	-0.7
May-05	4.1	4.4	4.4	4.1	2.8	-1.0	1.9	27.1

* Seasonally adjusted totals for US and overseas entries are calculated by Statistics Canada, and are adjusted to sum to national totals. Therefore, same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)					Other Transportation (000s)		
	Vancouver				Victoria Total	BC Ferries		Coquihalla Hwy Passenger Vehicles
	Total	Domestic	Trans- border	Other Int'l.		Vehicles	Passengers	

Annual data

2000	16,033	8,306	4,074	3,652	1,139	7,887	21,280	2,400
2001	15,477	7,868	4,001	3,608	1,158	8,104	21,309	2,461
2002	14,877	7,422	3,855	3,600	1,102	8,272	21,540	2,530
2003	14,321	7,266	3,814	3,241	1,183	8,263	21,348	2,480
2004	15,726	7,986	3,965	3,776	1,250	8,532	21,953	2,586

Annual growth rates

2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.7	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.8	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0
2004	9.8	9.9	3.9	16.5	5.7	3.3	2.8	4.3

Monthly data

May-04	1,319	665	328	326	103	702	1,812	215
Jun-04	1,323	672	322	329	103	703	1,809	213
Jul-04	1,315	673	322	321	104	709	1,822	220
Aug-04	1,296	654	328	315	100	694	1,774	208
Sep-04	1,345	687	339	319	110	712	1,832	222
Oct-04	1,327	678	336	313	104	718	1,850	215
Nov-04	1,338	682	341	316	105	726	1,867	221
Dec-04	1,348	695	338	316	107	750	1,911	216
Jan-05	1,377	716	345	316	109	682	1,719	206
Feb-05	1,365	705	334	326	111	727	1,859	228
Mar-05	1,383	701	351	331	113	725	1,848	225
Apr-05	1,376	687	345	344	110	721	1,846	222
May-05	1,404	692	354	357	110	726	1,867	229

Month-over-month growth rates

May-04	0.3	0.3	-2.9	3.9	-1.0	-1.9	-3.6	-2.6
Jun-04	0.3	1.1	-1.8	0.7	0.1	0.2	-0.2	-0.8
Jul-04	-0.6	0.1	-0.2	-2.5	0.8	0.9	0.7	2.9
Aug-04	-1.4	-2.9	2.0	-1.8	-4.0	-2.1	-2.6	-5.2
Sep-04	3.7	5.1	3.3	1.3	9.7	2.6	3.3	6.8
Oct-04	-1.3	-1.3	-1.0	-1.7	-5.1	0.8	1.0	-3.2
Nov-04	0.9	0.6	1.5	0.7	1.0	1.2	0.9	2.9
Dec-04	0.7	1.9	-0.8	0.0	2.3	3.2	2.4	-2.3
Jan-05	2.1	3.1	2.0	0.1	1.1	-9.1	-10.0	-4.6
Feb-05	-0.9	-1.6	-3.3	3.4	2.0	6.6	8.1	10.4
Mar-05	1.3	-0.6	5.2	1.5	1.9	-0.3	-0.6	-1.2
Apr-05	-0.5	-2.0	-1.7	3.9	-2.2	-0.5	-0.1	-1.4
May-05	2.0	0.8	2.6	3.7	-0.7	0.7	1.2	3.3

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel Industry ²		Consumer Price Index ¹	
	Total tourism related	Air transport ⁴	Accommodation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%) ³	Room Rate (\$)	Traveller accommodation	Restaurant food ⁴

Annual data

2000	188.4	14.8	28.2	116.7	28.8	60.0	114.04	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.12	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	116.99	124.2	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	113.72	111.8	127.6
2004	193.2	13.0	27.6	117.8	34.8	61.5	115.63	102.5	129.9

Annual Growth Rates

2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.7	0.8	-6.9	3.3
2003	1.1	4.4	-0.7	-0.3	6.8	-1.0	-2.8	-9.9	1.8
2004	0.2	2.2	-4.7	0.0	4.3	5.4	1.7	-8.4	1.8

Monthly data

May-04	193.1	12.8	28.5	117.4	34.4	61.1	115.20	103.0	129.7
Jun-04	192.7	13.2	27.5	117.7	34.2	62.4	115.60	102.6	129.8
Jul-04	192.2	13.0	27.6	117.1	34.6	61.8	115.80	102.2	129.8
Aug-04	193.9	13.2	27.6	117.6	35.5	59.7	115.40	100.9	129.7
Sep-04	193.7	13.2	27.6	117.0	35.8	62.4	115.90	102.0	130.0
Oct-04	191.0	13.3	27.5	115.6	34.5	62.0	115.00	102.0	130.3
Nov-04	193.7	13.2	27.4	117.5	35.6	62.7	115.80	103.2	130.6
Dec-04	195.0	13.0	27.6	118.1	36.2	63.5	117.40	103.4	131.9
Jan-05	194.6	13.2	27.8	117.8	35.8	61.2	111.30	103.9	131.7
Feb-05	194.3	13.1	28.3	117.1	35.8	63.1	110.60	103.1	131.9
Mar-05	194.5	13.0	28.1	117.5	35.9	63.8	111.90	102.1	132.3
Apr-05	192.9	13.1	28.4	116.3	35.1	63.3	113.00	100.5	132.5
May-05	194.4	13.2	28.5	116.8	35.8	65.9	115.20	99.5	133.0

Month-over-month growth rates

May-04	0.1	0.2	3.5	-0.4	-1.1	-0.6	-1.4	0.1	0.1
Jun-04	-0.2	3.1	-3.5	0.3	-0.5	1.3	0.3	-0.4	0.1
Jul-04	-0.2	-1.6	0.2	-0.5	0.9	-0.6	0.2	-0.4	0.0
Aug-04	0.9	1.5	0.1	0.4	2.7	-2.1	-0.3	-1.3	-0.1
Sep-04	-0.1	0.2	0.1	-0.5	0.7	2.7	0.4	1.1	0.2
Oct-04	-1.4	0.7	-0.3	-1.2	-3.6	-0.4	-0.8	0.0	0.2
Nov-04	1.4	-0.8	-0.4	1.6	3.2	0.7	0.7	1.2	0.2
Dec-04	0.7	-1.1	0.7	0.5	1.8	0.8	1.4	0.2	1.0
Jan-05	-0.2	1.3	0.7	-0.2	-1.3	-2.3	-5.2	0.5	-0.2
Feb-05	-0.2	-1.2	1.8	-0.6	0.2	1.9	-0.6	-0.8	0.2
Mar-05	0.1	-0.7	-0.6	0.4	0.1	0.7	1.2	-1.0	0.3
Apr-05	-0.8	0.9	0.9	-1.0	-2.2	-0.5	1.0	-1.6	0.2
May-05	0.8	0.9	0.4	0.4	2.2	2.6	1.9	-1.0	0.4

¹Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

²Source: Pannell Kerr Forster and BC Stats

³Occupancy Rate change expressed as percentage point change

⁴No identifiable seasonality.

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns ¹					
	Receipts (\$ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services

Annual data

2000	5,079.6	505.6	4,574.1	32,568.0	2,487.5	30,080.5
2001	5,317.2	533.7	4,783.5	33,743.3	2,602.8	31,140.5
2002	5,403.0	546.2	4,856.8	34,527.9	2,610.2	31,917.7
2003	5,654.4	584.9	5,069.5	35,043.2	2,626.9	32,416.4
2004	5,969.2	625.0	5,344.1	36,670.1	2,707.4	33,962.7

Annual growth rates

2000	5.3	5.3	5.2	6.9	4.3	7.2
2001	4.7	5.6	4.6	3.6	4.6	3.5
2002	1.6	2.3	1.5	2.3	0.3	2.5
2003	4.7	7.1	4.4	1.5	0.6	1.6
2004	5.6	6.9	5.4	4.6	3.1	4.8

Monthly data

May-04	491	53	439	3,050	229	2,821
Jun-04	496	53	443	3,054	229	2,826
Jul-04	491	52	439	3,046	232	2,814
Aug-04	496	51	445	3,109	223	2,887
Sep-04	505	52	453	3,071	224	2,847
Oct-04	505	53	452	3,066	226	2,840
Nov-04	530	52	478	3,158	219	2,939
Dec-04	497	52	445	3,031	226	2,805
Jan-05	525	53	472	3,186	227	2,959
Feb-05	547	50	497	3,227	224	3,004
Mar-05	531	43	488	3,150	229	2,922
Apr-05	546	45	501	3,145	226	2,920
May-05	570	48	522	3,188	224	2,964

Month-over-month growth rates

May-04	-0.5	1.8	-0.8	0.1	2.9	-0.2
Jun-04	1.0	0.7	1.0	0.1	0.1	0.2
Jul-04	-1.0	-0.9	-1.0	-0.3	1.2	-0.4
Aug-04	1.0	-3.0	1.5	2.1	-3.8	2.6
Sep-04	1.8	2.0	1.8	-1.2	0.5	-1.4
Oct-04	0.0	2.8	-0.3	-0.2	1.1	-0.3
Nov-04	4.9	-2.3	5.7	3.0	-3.3	3.5
Dec-04	-6.1	-0.4	-6.7	-4.0	3.2	-4.6
Jan-05	5.5	1.4	6.0	5.1	0.5	5.5
Feb-05	4.2	-5.4	5.2	1.3	-1.4	1.5
Mar-05	-2.9	-12.9	-1.9	-2.4	2.3	-2.7
Apr-05	2.8	2.8	2.8	-0.2	-1.3	-0.1
May-05	4.6	7.9	4.3	1.4	-0.6	1.5

¹Source: Statistics Canada & BC Stats.

Explanatory Notes

Data Sources

All room revenue data reported is compiled by BC STATS using the hotel tax database maintained and administered by the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Traveller Entry data is from Statistics Canada. All other data sources are accredited within the report.

Accommodation Categories

Each property has been assigned to one of eight accommodation categories. In addition to motels and four sizes of hotels, there are three special accommodation categories:

Fishing Lodges – All inland and coastal fishing camps located on or near lakes, rivers and oceans. Includes lodges which offer inland fishing expeditions, marinas with accommodation and lodges offering the services of fishing guides.

Vacation Rentals – Includes beach houses, cabins, and selected trailer parks. May also include certain inns and apartment complexes.

Miscellaneous – Includes guest ranches; outfitting, adventure hunting and other types of outdoor adventure; lodges that cater to skiers, hikers, etc. (with the exception of those lodges that mainly service cabins); bed and breakfasts; and houseboats. Also includes universities, mining firms, farms and other establishments renting rooms whose primary activity is not accommodation.

Seasonally Adjusted Data

Accommodation revenue exhibits large, regular seasonal fluctuations, characterised by peaks in the summer months and troughs in the winter months.

The *Tourism Sector Monitor* report uses Statistics Canada's X11/ARIMA/88 technique to remove the effects of seasonality from the revenue time series. The resulting seasonally adjusted series provides a useful tool for the analysis of underlying trends in accommodation revenue.

Unless otherwise indicated, revenue data in the *Tourism Sector Monitor* report is adjusted for seasonal fluctuations.

Tourism Sector Monitor is prepared by BC STATS, Ministry of Management Services, using data from the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Limitations

The data reported here is derived from the hotel tax database. Tax is not payable for several kinds of accommodation, including:

1. properties with three or fewer rooms (such as small bed and breakfast operations);
2. room rentals exceeding one month in duration;
3. lodging where the daily rate is below \$20;
4. lodging supplied to passengers of a ship or train while the ship or train is in transit or is making a scheduled stopover in the Province;
5. lodging supplied by employers to employees; and,
6. lodging supplied to consular employees and their staff.

Readers wishing more information regarding the nature of the hotel tax are referred to the Hotel Room Tax Act and the Hotel Room Tax Regulations.

Room Counts

Data are obtained primarily from Tourism BC's *Accommodation Guide* and supplemented by estimates from the Consumer Taxation Branch's hotel tax file. Vendors and their rooms are not counted in any given month unless revenue has been reported.

Suppression

The protection of confidentiality requires the suppression of categories not containing at least four properties. In most cases, protection is achieved by aggregating confidential cells into larger categories.

Revisions

A standard revision cycle accommodates corrections to the source data, to the allocation of consolidated reporters, and to the coding of properties by accommodation type. Revisions are implicit in the seasonally adjusted data and in the month-over-month, year-over-year and year-to-date percentage changes of subsequent reports, and are comprehensively reported in the annual tables published in the Annual issue of the *Tourism Sector Monitor* report.

Visit BC STATS on the World Wide Web at www.bcstats.gov.bc.ca

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Tourism Sector Monitor ♦ August 2005

Room Revenue

Room revenues rose (+3.2%, *seasonally adjusted*) in May, after slipping 0.5% in the previous month. Revenues were up in all but two regions of the province, led by North Coast (+20.9%) and Northeast (+33.7%), partly due to the tourism-related events in these regions, such as Homecoming in Prince Rupert and the BBC Foundation Golf Tournament in Fort St. John. Mainland/Southwest (+4.0%) also saw a substantial rise in revenues. Vancouver Island/Coast (-0.7%) and Cariboo (-7.2%) lost ground in May.

Room revenues rebounded in May

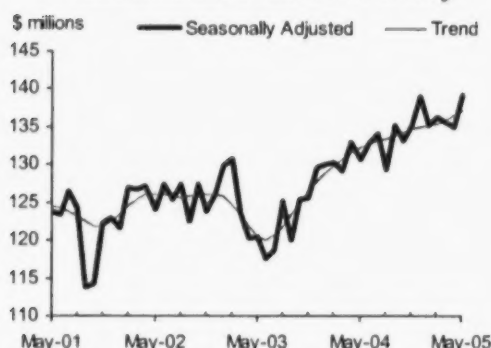


Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type			
	May 05 (\$000)	Apr 05 (\$000)	% change
Total	139,268	134,978	+3.2
Hotels	102,884	98,132	+4.8
Motels	18,147	18,067	+0.4
Other Acc.	19,270	16,252	+18.6
Regions (Top 3 performers)			
Northeast	5,158	3,857	+33.7
North Coast	2,033	1,681	+20.9
Mainland/Southwest	73,043	70,262	+4.0

Revenue generated by all types of establishments increased in May. Large hotels with more than 250 rooms (+8.9%) saw a big rise in revenues, regaining the ground lost (-6.1%) in April. Vacation rentals (+17.0%) and miscellaneous properties (+20.3%, including fishing lodges) also rebounded. Both motels (+0.4%) and midsize hotels (+0.4%, 151-250 rooms) posted gains for the fourth month in a row.

Visitor Entries

Visitor entries to Canada through BC border crossings rose 4.0% (*seasonally adjusted*) in May. The increase in entries was largely due to visits from the US (+4.4%), boosted by strong gains in both same-day (+5.5%), and overnight (+4.1%) travel. The number of overseas visits was up 2.6%, with entries from South Pacific nations jumping 28.5%. European entries (+1.9%) were also up in May, while fewer visitors from Hong Kong (-8.0%) and Taiwan (-5.7%) dragged the Asian market (-1.0%) down.

The number of Canadians re-entering the country through BC borders decreased (-1.4%) in May.

Visitor entries increased

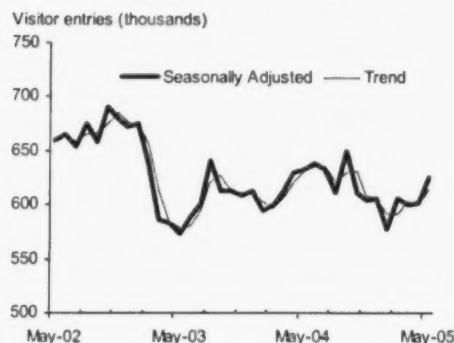


Table 2. Traveller Entries
(seasonally adjusted)

	May-05 (000)	Apr-05 (000)	% chg from Apr-05
American visitors			
Total	496	475	4.4
Same-day	203	192	5.5
Overnight	296	285	4.1
Overseas visitors			
Total	131	127	2.6
Europe	43	42	1.9
UK	22	19	11.9
Asia	65	66	-1.0
Japan	24	21	14.2
Taiwan	8	8	-5.7
Oceania	15	12	28.5

(BC STATS & Statistics Canada)

Note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Other Indicators

Most of the tourism indicators mirrored the pattern in room revenue and visitor entries, showing strong improvements in May.

The occupancy rate in BC hotels rose 2.7 percentage points. Accordingly, room prices were up 2.0%. The Consumer Price Index for traveller accommodation, however, fell (-1.0%) for the fourth consecutive month. Employment in the accommodation sector rose 0.8%.

Passenger traffic increased 1.9% at the Vancouver airport, but declined 0.7% in Victoria. More vehicles (+3.5%) passed the toll booth of the Coquihalla highway for the first time in three months. In addition, both vehicle (+0.7%) and passenger (+1.2%) volumes aboard BC Ferries were up.

With the restaurant food price index edging up (+0.3%), restaurant, caterer and tavern receipts jumped 5.9% in May, due to strong sales in BC's drinking places (+8.0%). Employment in the BC food and beverage service sector (+0.7%) rose for the first time in 2005.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	May-05	Change from Apr-05
Hotel Industry		
Occupancy rate	65.8	2.7 pp.
Average room charge	116.00	2.0%
(Pannell Kerr Forster)		
Airport Passengers (000s) (%)		
Vancouver International Airport		
Total traffic	1,396	1.9
US (trans-border)	351	2.6
Other International	351	3.3
Canada (domestic)	694	0.9
(YVR)		
Victoria International Airport		
Total traffic	110	-0.7
(Victoria Airport Authority)		
Restaurant Receipts (\$ millions) (%)		
All establishments	581	5.9
Food service	533	5.7
Drinking places	48	8.0
(Statistics Canada)		
Transportation (000s) (%)		
Coquihalla Highway		
Passenger Vehicles	229	3.5
(Ministry of Transportation & Highways)		
BC Ferries		
Vehicle Volume	726	0.7
Passenger Volume	1,866	1.2
(BC Ferries)		
Exchange Rates Cdn \$		
US \$	0.796	-0.01
UK Pound	0.429	0.00
Japanese Yen	84.911	-1.81
Australian \$	1.039	-0.01
(Statistics Canada)		

Note: pp. percentage points

Note to readers: all data in the *Tourism Sector Monitor* are reported on a seasonally adjusted basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues edged down (-0.3%, *seasonally adjusted*) in June, as six out of eight regions lost ground.

Province-wide, revenues were up significantly only in vacation rentals (+8.4%). Midsize hotels (151-250 rooms, -1.5%), motels (-6.0%), and non-standard accommodation (-8.4%, including fishing lodges, bed and breakfast and other short term accommodations) experienced substantial losses.

Visitor entries (-0.3%, *seasonally adjusted*) also slipped in June. This was due to a dip in the number of US visitors (-0.3%) as well as overseas travellers (-0.1%).

Passenger traffic dropped 1.3% at the Vancouver airport, but Victoria's airport (+1.3%) was busier in June than in the previous month. There were fewer passengers (-1.1%) and vehicles (-2.2%) aboard BC Ferries.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

Special Focus: Skiing in Whistler

Whistler is one of the most popular ski destinations in British Columbia. With two ski areas (Blackcomb Mountain and Whistler Mountain) combined, Whistler resort provides 33 lifts and over two hundred runs to skiers.

Whistler's history stretches back to the 1860s when Whistler Mountain was first named London Mountain by some British naval officers. The name "Whistler" was then used by settlers in the 1900s because of the whistling sound made by marmots in the area. Historically, Whistler was considered a summer resort destination (due to its abundant fish stocks) long before it became a winter one.

Top Resort in the Province

Whistler-Blackcomb Mountain was developed as a ski resort in the 1960s & '70s,¹ and since then has become a favourite among skiers from all over the world. It is recognized as a top ski resort by both domestic and foreign travellers. In 2003, Skiing Magazine² voted Whistler Blackcomb the "Number One Ski Resort in North America". As a matter of fact, Whistler urban centre³ receives the second highest accommodation room revenues across the 30 BC urban centres reported by BC Stats. In 2004, Whistler took in \$178.3 million in accommodation room revenues, second only to downtown Vancouver (\$407.5 million). In 2004, Whistler contributed 21% of the total accommodation room revenue in Mainland Southwest Development Region, and 11% of the provincial total.

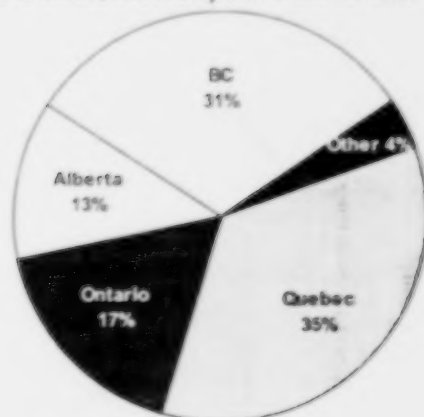
Whistler is also the second most profitable among the 30 urban centres across BC. The annual revenue per room in Whistler aver-

aged \$24,068 in 2004, over \$8,000 more than the provincial average (\$15,864).⁴ The difference roughly implies the location premium that Whistler accommodation operators are able to charge. The average annual revenue per room in downtown Vancouver, where many high-end hotels are located, was the highest in BC, reaching over \$30,000 in 2004.

More Skiing in Canada

According to the Canadian Ski Council, more and more skiers are attracted by Whistler and other BC ski resorts for world-class skiing experiences. In the 2003/04 ski season, BC⁵ hosted 6.1 million alpine ski and snow board visits⁶, 10.3% more than the 2002/03 ski season.

Quebec & BC, Most Popular Destinations



Data Source: Canadian Ski Council

BC's ski resorts accommodated 31% of the total skier visits in Canada, increasing from 29% ten years ago. Quebec is the most

¹ Whistler Mountain opened in 1966, Blackcomb Mountain opened in 1980

² www.skiingmag.com

³ BC Stats' definition

⁴ Annual revenue per room is a rough indicator of accommodation properties' profitability in a region. It takes both room rates and vacancy rates into consideration. This ratio (total revenues/number of rooms) should not be used as an implication of room rates.

⁵ www.canadianskicouncil.org; BC includes BC, Yukon & Heli-Ski operations

⁶ including visits from American and offshore skiers/snowboarders

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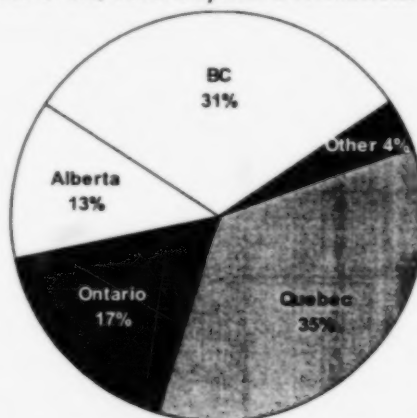
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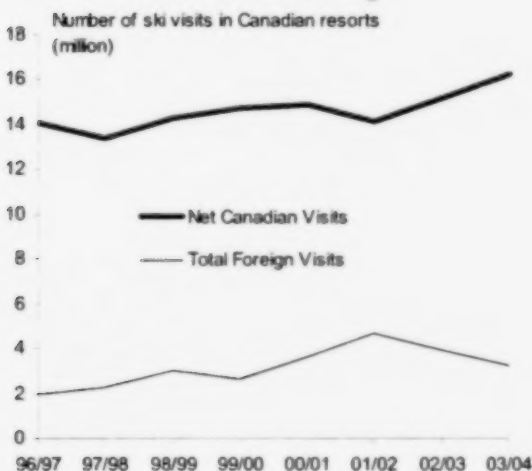
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popular region in Canada for skiers, with 35% of the visits in the 2003/04.

After September 11th, US skier visits and off-shore visits to Canada slumped more than 31.4% from 4.7 million in 2001/02 to 3.2 million in the 2003/04 season.

Luckily, domestic skiers took up the slack, with visits increasing 14.9% (or 2.1 million) over the same period. In fact, ski visits by Canadians have been increasing since the 1997/98 season, with the exception of 2001/02.

Total Ski Visits Rising



Data Source: Canadian Ski Council

Whistler in 2004

Despite the rising popularity of ski sports in Canada, Whistler resort had a hard time in the 2004/05 ski season.⁷ Overall room revenue in the last season (\$114.9 million) slumped 8.3%, dropping to a six-year-low level. The all time high was recorded in the millennium year, when revenue reached \$145 million. After 2000/01, however, room revenue has decreased for four consecutive years.

⁷ Ski season revenue is defined as the total room revenue in typical ski months in Whistler (December to April).

Monthly Room Revenue in Whistler

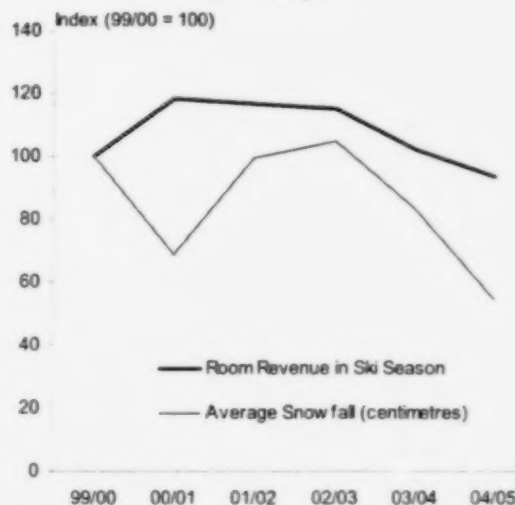
Accommodation Room Revenues in Whistler (\$ million, seasonally adjusted)



Data Source: BC Stats

One major reason for the downturn was low snowfall at the resort. Snowfall was only 640 centimetres in the 2004/05 ski season in Whistler, 34.4% less than the previous season (975 cm), which was already 20.7% lower than the year before (1,230 cm). What's more devastating for a ski resort than the lack of snow?

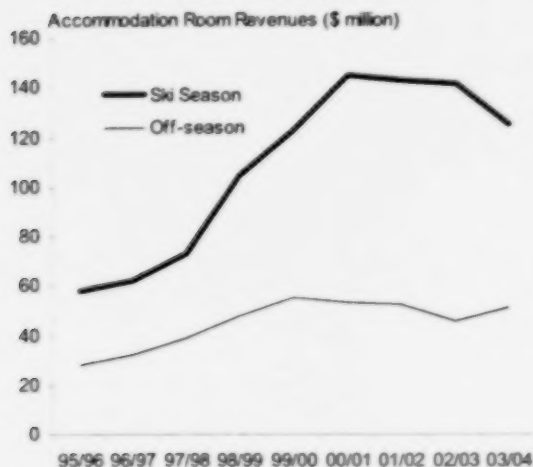
Ski Season Room Revenue Correlated with Total Snow fall



Data Source: Tourism Whistler & BC Stats

Other factors such as accommodation and ski facility development in the resort and weather conditions in competing resorts might also have affected skier visits and room revenue in Whistler. But a correlation between ski season room revenue and snowfall can be clearly observed from the above chart, with the exception of the millennium year.

Winter vs. Summer in Whistler



Data Source: BC STATS

On the other hand, it seems that Whistler resort is attracting more visitors during the summer months. In 2004 off-season months (May to November), room revenue totalled \$51.0 million, up 12.0% over the 2003 level. This partially offset the slowdown in the ski season.

Competition and Outlook

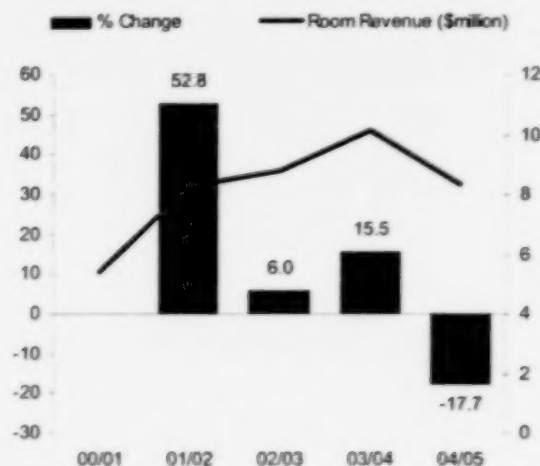
According to the Canadian Ski Council, there are about 70 ski areas in the province. Some of them have already gained domestic and international attention by offering world-class skiing experiences.

For example, among BC Stats' reporting urban centres, Fernie alpine resort is another ski resort where ski season room revenue was 150% more than its off-season receipts.

Fernie alpine resort was ranked by Skiing Magazine as the 10th best ski resort in North America.

Although Fernie alpine resort's accommodation revenue was less than one tenth of the revenue in Whistler, Fernie is growing by leaps and bounds. During the period from 2000/01 to 2003/04, Fernie's room revenue in the ski season almost doubled to more than \$10 million.

Ski Season Room Revenue in Fernie



Data Source: BC STATS

Another challenge for the Whistler resort is weather condition. Although not much can be done about the lack of snowfall in winter, promoting summer activities and turning Whistler into a year-round resort is a good strategy to make full use of the existing tourism capacity.

Of course, Whistler has a huge opportunity ahead of it—the 2010 Winter Olympic and Paralympic Games. According to the Canadian Tourism Commission, past Olympics have proven to significantly benefit the region that hosts the Games. As 2010 approaches, Whistler will certainly see more tourism-related investment, tourism businesses and visitors, all of which will boost the local tourism sector.

Appendix

List of Ski Areas in British Columbia

Apex Mountain Resort	Little Mac Ski Hill	Salmo Ski Area
Bear Mountain Ski Resort	Mad River Nordic Ski Enterprises Inc.	Selkirk Tangiers Helicopter Skiing Ltd.
Big Bam Ski Club	Manning Park Resort	Selkirk Wilderness Skiing Ltd.
Big White Ski Resort Ltd.	Mike Wiegale Helicopter Skiing	Shames Mountain Ski Corporation
Callaghan Country Wilderness Adventures	Morning Mountain	Silver Star Ski Resort
Crystal Mountain Resorts Ltd.	Mount Cain Alpine Park Society	Ski & Ride Smithers
Cypress Mountain	Mount Mackenzie Ski Area	Sno Much Fun Cat Skiing
Dawson Creek Ski & Recreation Association	Mount Seymour	Snowpatch Ski Society
Fairmont Hot Springs Resort Ltd.	Mount Timothy Ski Society	Soft Trax
Fernie Alpine Resort	Mount Washington Alpine Resort	Summit Lake Ski Area
Forbidden Plateau	Mt Arrowsmith Ski & Park	Sun Peaks Resort
Garibaldi Alpen Resorts (1996) Ltd	Mt. Baldy Ski Area	Sunset Ridge Ski Society
Great Canadian Heliskiing Ltd.	Murray Ridge Ski Area	Tabor Mountain Ski Resort Ltd.
Grouse Mountain Resorts Ltd.	Panorama Mountain Village	The Clearwater Ski Club
Harper Mountain	Phoenix Mountain Alpine Ski Society	The Hills Health Ranch
Hart Highlands Winter Club	Powder King Mountain Resort	Troll Ski Resort
Hell's Gate Airtam Inc.	Powder Mountain Snowcats Ltd.	Tweedsmuir Ski Club
Hemlock Valley Resorts Inc.	Powder Springs Resort	Tyax Lodge Heli-Skiing
Hudson's Hope Ski Association	Purcell Helicopter Skiing Ltd.	Wapiti Ski Club
Interior Alpine Recreation Ltd.	Purden Ski Village	Whistler Blackcomb
Kicking Horse Mountain Resort	R.K. Heli-Ski Panorama Inc.	Whistler Cross-Country Ski Trails
Kimberley Alpine Resort	Red Resort	Whitetooth Ski Area
Klondike Heliskiing	Retallack Alpine Adventures Ltd.	Whitewater Ski Resort Ltd.
Kootenay Helicopter Skiing		

Source: Canadian Ski Council

Table 1: Room Revenue by Development Region (\$000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,244	863,420	229,533	76,892	46,181	20,127	8,811	51,889	1,592,097

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	3.9	-1.3	12.2	7.1

Monthly data

May-04	23,968	72,171	18,924	5,927	3,645	1,611	729	3,741	130,717
Jun-04	24,328	73,274	18,869	6,275	3,770	1,671	741	4,026	132,953
Jul-04	24,580	73,284	19,355	6,514	3,779	1,750	735	4,141	134,137
Aug-04	24,536	70,129	18,279	6,193	3,835	1,716	725	4,085	129,497
Sep-04	25,081	73,716	19,277	6,469	3,821	1,653	764	4,344	135,124
Oct-04	24,702	71,479	19,104	6,283	3,913	1,702	737	5,257	133,177
Nov-04	25,232	71,716	19,994	6,508	3,953	1,743	767	5,227	135,138
Dec-04	26,102	74,329	20,351	6,284	4,746	1,535	782	4,823	138,952
Jan-05	26,037	71,188	20,417	6,256	3,890	1,629	844	5,025	135,286
Feb-05	25,531	70,623	21,035	6,157	4,228	1,703	1,026	6,088	136,391
Mar-05	26,729	69,771	21,266	6,116	4,187	1,756	1,014	4,778	135,617
Apr-05	26,032	70,262	21,157	6,334	4,726	1,681	929	3,857	134,978
May-05	25,838	73,043	21,378	6,492	4,388	2,033	939	5,158	139,268

Month-over-month growth rates

May-04	0.1	-1.9	1.7	-10.9	0.8	-7.1	-9.3	-7.3	-1.7
Jun-04	1.5	1.5	-0.3	5.9	3.4	3.7	1.6	7.6	1.7
Jul-04	1.0	0.0	2.6	3.8	0.3	4.7	-0.8	2.9	0.9
Aug-04	-0.2	-4.3	-5.6	-4.9	1.5	-1.9	-1.3	-1.4	-3.5
Sep-04	2.2	5.1	5.5	4.5	-0.4	-3.7	5.4	6.4	4.3
Oct-04	-1.5	-3.0	-0.9	-2.9	2.4	3.0	-3.5	21.0	-1.4
Nov-04	2.1	0.3	4.7	3.6	1.0	2.4	4.0	-0.6	1.5
Dec-04	3.4	3.6	1.8	-3.4	20.1	-11.9	2.0	-7.7	2.8
Jan-05	-0.2	-4.2	0.3	-0.4	-18.0	6.1	7.9	4.2	-2.6
Feb-05	-1.9	-0.8	3.0	-1.6	8.7	4.6	21.5	21.2	0.8
Mar-05	4.7	-1.2	1.1	-0.7	-1.0	3.1	-1.2	-21.5	-0.6
Apr-05	-2.6	0.7	-0.5	3.6	12.9	-4.2	-8.4	-19.3	-0.5
May-05	-0.7	4.0	1.0	2.5	-7.2	20.9	1.1	33.7	3.2

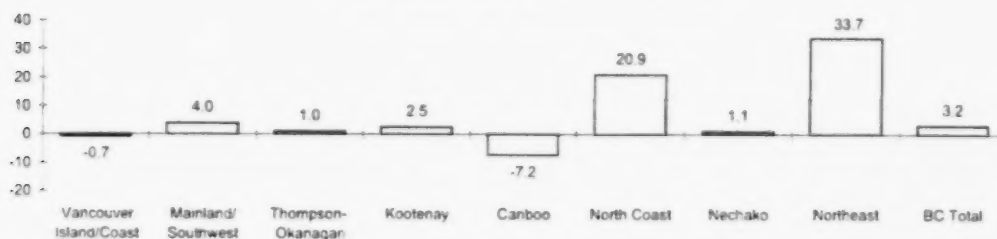
May month-over-month percent growth


Table 2: Room Revenue by Accommodation Type (\$000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous incl. Fishing Lodges
	251+	151-250	76-150	1-75			

Annual data

2000	442,228	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423
2004	467,820	198,608	321,679	185,692	195,041	124,433	98,824

Annual growth rates

2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
2004	6.8	9.8	8.2	6.6	7.5	4.1	3.6

Monthly data

May-04	39,751	16,347	26,666	15,235	15,959	10,283	7,462
Jun-04	40,142	16,693	26,902	15,534	16,092	10,126	8,031
Jul-04	38,939	16,519	27,142	15,810	16,475	10,377	8,428
Aug-04	37,691	16,316	26,225	15,373	15,484	10,301	8,237
Sep-04	40,540	17,034	27,194	15,917	16,266	10,598	8,659
Oct-04	37,365	16,613	27,003	16,060	16,470	11,299	8,295
Nov-04	37,710	17,796	28,012	15,731	17,764	11,133	8,575
Dec-04	42,803	17,336	27,261	15,574	17,206	11,270	8,367
Jan-05	39,038	16,580	27,129	15,028	16,509	11,245	8,049
Feb-05	38,658	17,027	27,633	15,816	17,382	10,705	8,291
Mar-05	38,551	17,070	27,866	16,625	17,790	10,100	8,357
Apr-05	36,186	17,759	27,711	16,477	18,067	8,626	7,626
May-05	39,411	17,839	28,566	17,068	18,147	10,094	9,176

Month-over-month growth rates

May-04	-1.4	4.1	-1.1	-0.8	0.7	-2.7	-10.4
Jun-04	1.0	2.1	0.9	2.0	0.8	-1.5	7.6
Jul-04	-3.0	-1.0	0.9	1.8	2.4	2.5	5.0
Aug-04	-3.2	-1.2	-3.4	-2.8	-6.0	-0.7	-2.3
Sep-04	7.6	4.4	3.7	3.5	5.1	2.9	5.1
Oct-04	-7.8	-2.5	-0.7	0.9	1.3	6.6	-4.2
Nov-04	0.9	7.1	3.7	-2.1	7.9	-1.5	3.4
Dec-04	13.5	-2.5	-2.7	-1.0	-3.1	1.2	-2.4
Jan-05	-8.8	-4.4	-0.5	-3.5	-4.1	-0.2	-3.8
Feb-05	-1.0	2.7	1.9	5.2	5.3	-4.8	3.0
Mar-05	-0.3	0.3	0.8	5.1	2.3	-5.7	0.8
Apr-05	-6.1	4.0	-0.6	-0.9	1.6	-14.6	-8.7
May-05	8.9	0.4	3.1	3.6	0.4	17.0	20.3

May month-over-month percent growth

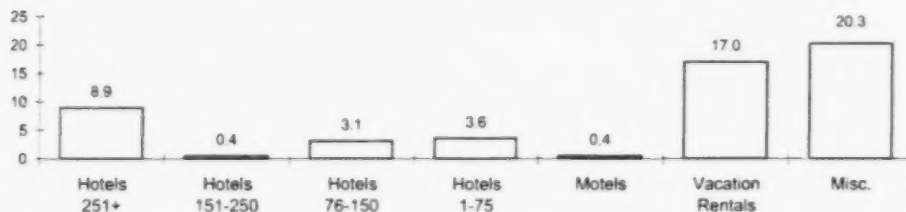


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	May-05	YTD 05	May-04	YTD 04	May-05	May-04	May-05	May-04
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	15,866	55,309	2.4	9.7	173	-4	7,969	-353
Total - Hotels	13,216	46,485	1.8	9.0	66	-3	5,314	-250
76+ Rooms	10,258	35,953	-0.4	7.6	25	-1	3,851	-86
1-75 Rooms	2,957	10,533	10.2	13.9	41	-2	1,463	-164
Motels	1,267	4,553	6.4	10.6	29	-1	1,044	-51
Vacation Rentals	452	1,417	5.2	10.4	30	3	339	-43
19 Cowichan Valley								
Total - All accommodation types	699	2,869	-7.3	7.3	35	-1	601	-59
Motels	209	738	30.2	8.9	17	1	324	19
21 Nanaimo								
Total - All accommodation types	3,454	12,845	16.8	9.5	69	-4	2,455	-103
Total - Hotels	1,942	7,113	24.0	9.0	18	-2	1,126	-140
Motels	662	2,548	16.0	14.1	23	1	621	55
Vacation Rentals	703	2,703	6.6	7.1	20	-1	576	-9
23 Alberni-Clayoquot								
Total - All accommodation types	3,271	11,164	15.0	13.7	62	3	1,476	34
Total - Hotels	851	2,777	2.6	-0.4	12	0	455	0
Motels	303	1,061	5.7	18.6	20	0	405	0
Vacation Rentals	1,200	4,380	26.6	29.7	14	3	330	51
25 Comox-Strathcona								
Total - All accommodation types	2,835	8,862	12.0	-6.1	69	2	1,890	114
Fishing lodges	467	666	-11.3	-12.3	15	2	314	30
Motels	678	2,438	12.9	-4.1	23	0	605	0
Vacation Rentals	271	648	12.0	-38.9	15	-2	197	-12
27 Powell River								
Total - All accommodation types	308	1,189	-13.0	-31.7	18	-1	370	-4
43 Mount Waddington								
Total - All accommodation types	363	1,136	-14.4	-2.5	18	-3	497	-180
45 Central Coast								
Total - All accommodation types	291	397	16.1	-4.1	11	1	154	3
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	3,154	13,492	1.6	-0.4	70	3	2,507	-43
Total - Hotels	2,256	10,018	-1.6	0.6	20	-3	1,414	-81
Motels	731	2,717	5.0	12.9	38	1	938	13
15 Greater Vancouver								
Total - All accommodation types	64,160	226,796	3.7	5.1	243	0	27,166	20
Total - Hotels	60,618	212,163	3.4	3.1	158	-1	23,079	-159
251+ Rooms	33,379	114,800	0.1	0.1	24	-1	9,690	-266
151-250 Rooms	11,245	40,571	7.6	5.7	26	1	4,952	200
76-150 Rooms	11,895	42,708	7.2	7.7	52	-2	5,668	-181
1-75 Rooms	4,100	14,083	9.1	8.5	56	1	2,769	88
Motels	1,662	6,133	16.4	13.4	37	0	1,621	64
Vacation Rentals	434	5,859	-38.2	113.0	17	0	635	88
29 Sunshine Coast								
Total - All accommodation types	405	1,318	15.5	8.3	22	-2	397	-18
31 Squamish-Lillooet								
Total - All accommodation types	5,615	94,078	-9.8	-11.9	95	2	7,326	582
Total - Hotels	4,927	75,612	-5.1	-11.2	45	0	5,628	221
76-150 Rooms	1,210	18,548	-3.4	-14.9	15	0	1,514	-5
1-75 Rooms	392	5,374	-4.1	-25.9	19	-1	685	-46
Vacation Rentals	358	13,556	-46.1	-13.2	26	2	1,195	315
Miscellaneous	189	4,313	-14.8	-20.2	17	0	334	46
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	3,129	9,632	4.6	6.1	108	-7	3,020	-225
Total - Hotels	1,740	5,340	3.4	-2.7	15	-1	1,074	-85
Motels	1,108	3,068	3.9	8.1	71	-8	1,681	-163

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	May-05	YTD 05	May-04	YTD 04	May-05	May-04	May-05	May-04
33 Thompson-Nicola								
Total - All accommodation types	5,868	24,075	5.7	4.7	157	1	5,503	46
Total - Hotels	3,017	10,772	8.6	4.5	35	1	2,240	51
76+ Rooms	2,423	8,804	9.9	4.1	12	1	1,388	76
1-75 Rooms	594	1,968	3.5	6.1	23	0	852	-25
Motels	2,054	5,955	4.9	6.5	75	0	2,273	-5
Vacation Rentals	294	5,572	-22.1	0.4	18	-1	457	-11
35 Central Okanagan								
Total - All accommodation types	6,085	26,201	2.9	14.6	59	-4	3,389	-88
Total - Hotels	4,451	17,274	3.5	12.5	19	0	1,710	0
Motels	1,213	3,529	-5.2	-3.3	24	-3	1,080	-97
Vacation Rentals	182	4,912	10.1	39.9	12	-2	185	-16
37 North Okanagan								
Total - All accommodation types	1,767	9,451	39.1	19.2	46	0	1,463	-31
Total - Hotels	971	6,154	44.7	19.7	11	1	757	20
Motels	722	2,261	31.9	23.5	20	1	615	-39
39 Columbia-Shuswap								
Total - All accommodation types	2,982	12,946	28.3	14.9	100	1	3,222	-1
Total - Hotels	1,303	4,998	6.9	7.8	19	1	1,232	12
Motels	1,041	3,853	7.1	4.5	47	-2	1,472	-81
Miscellaneous	454	3,480	664.4	37.1	21	3	375	78
Kootenay								
01 East Kootenay								
Total - All accommodation types	3,174	21,782	14.2	-6.1	105	-1	4,306	-38
Total - Hotels	1,071	7,944	18.5	8.5	23	1	1,380	21
Motels	951	3,484	13.2	1.8	49	-2	1,129	-83
Vacation Rentals	326	5,115	6.0	-22.1	16	1	952	44
03 Central Kootenay								
Total - All accommodation types	1,629	6,366	2.6	5.5	78	-2	1,568	-62
Total - Hotels	870	3,517	-1.4	4.6	18	0	725	-44
Motels	437	1,550	1.9	15.9	30	-1	543	-12
Vacation Rentals	136	414	19.5	33.2	18	-2	146	-11
05 Kootenay Boundary								
Total - All accommodation types	427	2,221	8.2	-6.1	32	-1	580	-75
Motels	272	995	12.1	-4.9	21	-1	356	-14
Cariboo								
41 Cariboo								
Total - All accommodation types	1,585	5,559	10.4	10.8	97	-2	2,015	21
Fishing lodges	53	87	30.1	12.4	13	2	124	47
Motels	891	3,284	12.7	14.9	34	0	1,000	25
Vacation Rentals	71	127	12.2	9.6	28	-2	264	-22
53 Fraser-Fort George								
Total - All accommodation types	3,027	12,084	26.4	21.0	57	0	2,775	70
Total - Hotels	2,123	8,860	26.1	22.6	20	1	1,489	82
Motels	762	2,751	21.7	20.4	29	0	978	-8
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	1,013	2,653	15.2	-0.6	39	1	1,078	-15
Motels	198	580	10.2	-12.4	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	880	3,152	41.0	14.4	34	2	822	-5
Motels	384	1,224	65.4	25.2	16	0	387	-27
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	821	3,452	25.9	33.8	51	0	1,099	-53
Motels	477	1,844	20.6	23.2	23	-2	612	-57
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	3,269	29,369	36.4	25.7	65	-4	2,832	-695
Total - Hotels	1,808	12,253	26.6	15.4	23	1	1,579	40
Motels	1,063	5,760	55.3	25.5	32	-2	886	-65

** Data for regions with fewer than 10 properties reporting can not be released.

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	May-05	YTD 05	May-04	YTD 04	May-05	May-04	May-05	May-04
Vancouver Island/Coast	27,086	93,771	5.8	7.3	455	-7	15,412	-548
Victoria (C)	12,696	45,210	0.6	9.2	75	-4	5,316	-260
Other CRD	2,432	7,350	2.4	3.5	87	0	2,301	-113
Nanaimo (C)	2,122	7,885	34.9	16.2	23	2	1,221	74
Port Alberni (C)	267	1,276	3.4	22.6	13	0	351	-1
Courtenay (C)	885	3,294	-	-	11	2	463	45
Rest of Development Region	8,684	28,756	-	-	257	-5	5,760	-293
Mainland/Southwest	73,333	335,684	2.5	-0.5	430	3	37,396	541
Downtown Vancouver (C)	42,123	139,735	1.3	1.9	86	3	13,118	333
Other Vancouver (C)	3,397	14,833	13.5	45.7	38	-2	2,871	138
Richmond (C)	9,280	37,152	11.4	6.9	25	2	4,317	-4
Burnaby (C)	2,356	9,208	-4.6	-5.0	11	-1	1,357	112
Other GVRD	7,004	25,868	7.9	7.6	83	-2	5,503	-169
Whistler (DM)	5,062	91,101	-12.1	-12.6	70	1	6,660	483
Rest of Development Region	4,111	17,788	5.1	3.0	117	2	3,570	-352
Thompson/Okanagan	19,832	82,305	9.9	11.0	470	-9	16,597	-299
Penticton (C)	1,792	5,742	-1.0	-2.3	44	-4	1,675	-180
Kamloops (C)	4,507	19,550	3.7	2.5	67	2	3,636	90
Kelowna (C)	5,554	24,633	3.2	15.5	46	-3	2,906	-55
Vernon (C)	1,663	9,211	40.0	19.5	30	2	1,288	-16
Revelstoke (C)	1,203	5,329	41.3	6.4	30	1	1,223	-22
Rest of Development Region	5,113	17,841	14.3	17.8	253	-7	5,869	-116
Kootenay	5,230	30,369	9.8	-3.9	215	-4	6,454	-175
Cranbrook (C)	732	2,882	24.9	16.9	16	-1	758	-36
Nelson (C)	492	2,163	-8.0	-6.3	13	2	431	12
Rest of Development Region	4,005	25,325	10.0	-5.6	199	-3	5,696	-139
Cariboo	4,613	17,643	20.4	17.6	154	-2	4,790	91
Quesnel (C)	310	1,359	1.6	7.5	12	0	427	0
Williams Lake (C)	480	1,791	10.1	16.4	12	2	574	72
Prince George (C)	2,315	9,523	24.3	22.7	31	1	2,000	74
Rest of Development Region	1,509	4,970	22.8	12.0	99	-5	1,789	-55
North Coast	1,894	5,805	25.9	7.0	73	3	1,900	-20
Prince Rupert (C)	628	2,021	13.5	-0.6	15	0	761	0
Terrace (C)	566	1,944	47.1	16.0	12	0	421	3
Rest of Development Region	699	1,840	23.6	7.3	46	3	718	-23
Nechako	821	3,452	25.9	33.8	51	0	1,099	-53
Smithers (T)	373	1,876	33.4	55.1	14	2	432	33
Rest of Development Region	448	1,576	20.2	15.1	37	-2	667	268
Northeast	3,269	29,369	36.4	25.7	65	-4	2,832	-695
Dawson Creek (C)	567	3,442	42.0	39.6	13	0	471	-13
Fort St. John (C)	1,171	13,510	49.3	8.3	16	-2	930	-80
Rest of Development Region	1,531	12,418	26.2	47.2	36	-2	1,431	-602

.. Data for regions with fewer than 10 properties reporting can not be released.

Table 5: Historical Unadjusted Room Revenue by Development Region (\$000)

Period	Vancouver Isle./Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,244	863,420	229,533	76,892	46,181	20,127	8,811	51,889	1,592,097

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	3.9	-1.3	12.2	7.1

Monthly data

May-04	25,608	71,529	18,051	4,761	3,831	1,504	652	2,397	128,334
Jun-04	31,380	81,605	21,957	5,917	4,699	2,786	984	3,231	152,559
Jul-04	44,238	98,089	37,609	9,647	5,481	3,434	1,051	3,896	203,445
Aug-04	49,430	101,817	37,115	10,120	6,109	3,253	1,100	4,029	212,973
Sep-04	35,179	81,870	23,602	7,603	5,234	2,334	1,172	4,075	161,067
Oct-04	20,981	55,010	13,961	4,252	3,996	1,251	886	5,132	105,468
Nov-04	13,405	43,212	8,484	2,886	2,856	959	570	4,183	76,555
Dec-04	13,224	64,448	12,659	4,875	2,804	685	469	3,971	103,134
Jan-05	11,280	61,240	13,149	5,699	2,447	729	486	5,918	100,947
Feb-05	14,441	68,394	16,491	7,347	2,830	1,027	666	9,235	120,430
Mar-05	19,694	72,544	19,323	7,273	3,540	1,143	841	7,430	131,788
Apr-05	21,270	60,174	13,511	4,820	4,213	1,013	638	3,518	109,157
May-05	27,086	73,333	19,832	5,230	4,613	1,894	821	3,269	136,077

Year-over-year percent changes

May-04	4.7	11.6	10.5	1.7	1.3	4.3	-2.1	-2.2	8.8
Jun-04	9.0	17.0	2.6	5.0	4.8	6.8	6.0	12.0	11.8
Jul-04	12.4	13.9	14.4	11.6	6.0	10.7	-0.7	3.6	13.0
Aug-04	5.2	0.6	0.2	1.5	9.7	4.7	-3.6	1.3	1.9
Sep-04	11.8	12.8	17.9	14.1	9.6	-0.2	7.4	15.2	13.1
Oct-04	5.4	5.2	1.2	0.2	5.9	3.7	-8.0	48.5	5.9
Nov-04	5.1	4.3	5.5	16.2	8.9	6.2	5.9	41.0	6.7
Dec-04	12.4	8.6	8.6	-3.0	27.5	-17.5	3.4	4.4	8.5
Jan-05	3.6	2.9	5.0	-3.0	7.5	-7.8	17.1	33.7	4.4
Feb-05	2.2	-0.1	9.3	-10.2	15.5	-0.6	45.0	46.0	3.7
Mar-05	13.9	-2.4	22.4	-6.4	9.8	9.9	65.8	13.2	4.1
Apr-05	9.1	-5.2	6.4	-3.7	30.7	-4.1	17.1	-3.9	0.0
May-05	5.8	2.5	9.9	9.8	20.4	25.9	25.9	36.4	6.0

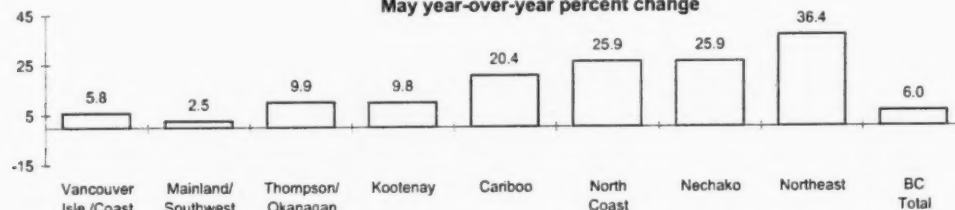
May year-over-year percent change


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**

Annual data

2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,970.8	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.8	118.0
2003	7,335.3	6,137.4	2,580.7	3,556.7	1,197.8	577.6	410.1	124.8
2004	7,423.9	6,020.7	2,468.0	3,571.1	1,403.2	715.8	458.1	144.3

Annual percent changes

2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.1	-4.3	-13.8	4.2	-3.0	4.4	-11.7	-10.5
2003	-8.0	-7.0	-8.1	-6.1	-12.9	-24.4	-0.4	5.8
2004	1.2	-1.9	-4.4	0.4	17.1	23.9	11.7	15.6

Monthly data

Jun-04	638.8	511.9	212.4	297.4	126.9	67.7	39.4	12.6
Jul-04	632.9	510.3	206.1	300.9	122.5	59.9	41.9	12.6
Aug-04	611.3	494.0	197.0	294.9	117.3	56.2	38.7	12.5
Sep-04	649.6	529.7	200.7	310.4	119.8	58.3	40.4	12.6
Oct-04	612.0	493.7	202.3	295.0	118.3	58.4	39.7	11.7
Nov-04	604.6	492.8	201.1	298.1	111.8	56.2	36.1	12.1
Dec-04	606.1	491.0	197.7	292.9	115.0	55.6	39.3	12.2
Jan-05	577.9	463.0	179.4	288.5	114.9	54.7	40.5	12.3
Feb-05	606.0	484.1	198.4	289.8	122.0	61.3	40.5	12.5
Mar-05	599.8	476.4	195.6	283.0	123.5	63.4	42.0	12.2
Apr-05	602.0	474.6	192.0	284.7	127.4	65.5	41.9	12.0
May-05	626.3	495.6	202.5	296.3	130.7	64.8	42.7	15.5
Jun-05	624.6	494.1	206.3	290.2	130.5	66.3	42.1	14.2

Month-over-month growth rates

Jun-04	1.0	1.2	3.1	0.9	0.5	2.6	1.8	-0.7
Jul-04	-0.9	-0.3	-3.0	1.2	-3.4	-11.5	6.4	0.1
Aug-04	-3.4	-3.2	-4.4	-2.0	-4.3	-6.2	-7.6	-1.0
Sep-04	6.3	7.2	1.8	5.2	2.2	3.6	4.5	0.6
Oct-04	-5.8	-6.8	0.8	-4.9	-1.3	0.2	-1.8	-7.0
Nov-04	-1.2	-0.2	-0.6	1.0	-5.4	-3.9	-9.1	3.3
Dec-04	0.2	-0.3	-1.7	-1.7	2.9	-1.0	8.9	1.0
Jan-05	-4.6	-5.7	-9.3	-1.5	-0.1	-1.5	2.9	0.7
Feb-05	4.9	4.5	10.6	0.4	6.1	12.0	0.1	2.1
Mar-05	-1.0	-1.6	-1.4	-2.3	1.2	3.4	3.7	-2.4
Apr-05	0.4	-0.4	-1.8	0.6	3.2	3.3	-0.2	-1.7
May-05	4.0	4.4	5.5	4.1	2.6	-1.0	1.9	28.5
Jun-05	-0.3	-0.3	1.9	-2.1	-0.1	2.3	-1.4	-7.9

* Seasonally adjusted totals for US and overseas entries are calculated by Statistics Canada, and are adjusted to sum to national totals. Therefore, same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)				Other Transportation (000s)			
	Vancouver				Victoria	BC Ferries		Coquihalla Hwy Passenger Vehicles
	Total	Domestic	Trans- border	Other Int'l.		Vehicles	Passengers	

Annual data

2000	16,033	8,306	4,074	3,652	1,139	7,887	21,280	2,400
2001	15,477	7,868	4,001	3,608	1,158	8,104	21,309	2,461
2002	14,877	7,422	3,855	3,600	1,102	8,272	21,540	2,530
2003	14,322	7,267	3,815	3,241	1,183	8,263	21,348	2,480
2004	15,726	7,986	3,965	3,775	1,250	8,532	21,953	2,586

Annual growth rates

2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.7	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.8	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0
2004	9.8	9.9	3.9	16.5	5.7	3.3	2.8	4.3

Monthly data

Jun-04	1,327	671	327	329	104	706	1,815	213
Jul-04	1,318	672	323	323	104	709	1,822	220
Aug-04	1,299	654	329	316	100	694	1,769	208
Sep-04	1,346	686	340	320	110	712	1,833	222
Oct-04	1,328	677	336	315	104	717	1,849	215
Nov-04	1,340	682	341	317	105	727	1,866	221
Dec-04	1,349	695	338	316	107	750	1,911	217
Jan-05	1,377	716	344	316	109	682	1,719	206
Feb-05	1,364	706	332	326	111	727	1,858	227
Mar-05	1,380	702	349	329	113	724	1,848	224
Apr-05	1,370	688	342	340	110	721	1,844	221
May-05	1,396	694	351	351	110	726	1,866	229
Jun-05	1,378	705	331	342	111	718	1,825	224

Month-over-month growth rates

Jun-04	1.0	0.7	0.3	2.2	0.3	0.5	0.2	-0.8
Jul-04	-0.7	0.2	-1.2	-1.9	0.6	0.4	0.4	3.1
Aug-04	-1.4	-2.7	1.8	-2.0	-4.0	-2.1	-2.9	-5.3
Sep-04	3.6	4.9	3.4	1.3	9.7	2.6	3.6	6.9
Oct-04	-1.3	-1.2	-1.1	-1.8	-5.1	0.7	0.8	-3.2
Nov-04	0.9	0.7	1.5	0.7	1.0	1.3	0.9	2.5
Dec-04	0.7	1.8	-0.9	-0.1	2.3	3.2	2.4	-1.6
Jan-05	2.0	3.1	1.8	-0.2	1.1	-9.1	-10.1	-5.2
Feb-05	-0.9	-1.5	-3.5	3.3	2.0	6.6	8.1	10.4
Mar-05	1.2	-0.6	5.0	0.9	1.9	-0.3	-0.6	-1.3
Apr-05	-0.7	-1.9	-2.0	3.3	-2.2	-0.5	-0.2	-1.3
May-05	1.9	0.9	2.6	3.3	-0.7	0.7	1.2	3.5
Jun-05	-1.3	1.6	-5.6	-2.7	1.3	-1.1	-2.2	-2.1

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel Industry ²		Consumer Price Index ¹	
	Total tourism related	Air transport ⁴	Accommodation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%) ³	Room Rate (\$)	Traveller accomodation	Restaurant food ⁴

Annual data

2000	188.4	14.8	28.2	116.7	28.8	60.0	114.04	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.13	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	116.99	124.1	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	113.72	111.9	127.6
2004	193.2	13.0	27.6	117.8	34.8	61.6	115.56	102.5	129.9

Annual Growth Rates

2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.7	0.7	-6.9	3.4
2003	1.1	4.4	-0.7	-0.3	6.8	-1.0	-2.8	-9.9	1.8
2004	0.2	2.2	-4.7	0.0	4.3	5.6	1.6	-8.4	1.8

Monthly data

Jun-04	192.5	13.2	27.4	117.8	34.1	62.3	115.00	102.9	129.8
Jul-04	191.8	13.0	27.5	116.8	34.5	61.8	115.70	102.3	129.7
Aug-04	194.1	13.2	27.6	117.8	35.4	59.6	115.30	100.9	129.6
Sep-04	193.4	13.2	27.6	116.9	35.7	62.4	115.80	102.1	129.9
Oct-04	192.4	13.3	27.5	116.7	34.9	62.1	114.90	102.0	130.3
Nov-04	193.8	13.2	27.4	117.6	35.5	62.8	115.70	103.2	130.6
Dec-04	195.4	13.1	27.6	118.6	36.2	63.6	117.30	103.3	131.9
Jan-05	195.2	13.2	27.9	118.4	35.7	61.3	111.30	103.8	131.7
Feb-05	195.4	13.1	28.3	118.1	35.9	63.0	110.60	103.0	132.0
Mar-05	194.5	13.0	28.2	117.4	36.0	63.8	112.20	102.0	132.4
Apr-05	193.7	13.1	28.4	117.0	35.2	63.1	113.70	100.3	132.7
May-05	195.7	13.2	28.7	117.8	36.0	65.8	116.00	99.3	133.1
Jun-05	196.3	13.1	28.9	118.0	36.4	64.9	117.00	98.7	134.5

Month-over-month growth rates

Jun-04	-0.3	3.2	-4.1	0.4	-0.9	0.9	-0.4	-0.1	0.0
Jul-04	-0.4	-1.5	0.3	-0.9	1.4	-0.5	0.6	-0.6	-0.1
Aug-04	1.2	1.5	0.4	0.9	2.6	-2.2	-0.3	-1.4	-0.1
Sep-04	-0.4	0.2	-0.2	-0.8	0.8	2.8	0.4	1.2	0.2
Oct-04	-0.5	0.8	-0.1	-0.2	-2.4	-0.3	-0.8	-0.1	0.3
Nov-04	0.7	-0.8	-0.3	0.8	1.7	0.7	0.7	1.2	0.2
Dec-04	0.8	-1.1	0.6	0.8	2.0	0.8	1.4	0.1	1.0
Jan-05	-0.1	1.3	0.9	-0.1	-1.3	-2.3	-5.1	0.5	-0.2
Feb-05	0.1	-1.2	1.8	-0.3	0.5	1.7	-0.6	-0.8	0.2
Mar-05	-0.5	-0.8	-0.6	-0.6	0.3	0.8	1.4	-1.0	0.3
Apr-05	-0.4	0.9	0.9	-0.3	-2.2	-0.7	1.3	-1.7	0.2
May-05	1.0	0.8	0.8	0.7	2.3	2.7	2.0	-1.0	0.3
Jun-05	0.3	-0.6	0.7	0.1	1.1	-0.9	0.9	-0.6	1.1

¹Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

²Source: Pannell Kerr Forster and BC Stats

³Occupancy Rate change expressed as percentage point change

⁴No identifiable seasonality.

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns ¹					
	Receipts (\$ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services

Annual data

2000	5,079.6	505.6	4,574.1	32,568.0	2,487.5	30,080.5
2001	5,317.2	533.7	4,783.5	33,743.3	2,602.8	31,140.5
2002	5,403.0	546.2	4,856.8	34,527.9	2,610.2	31,917.7
2003	5,654.4	584.9	5,069.5	35,043.2	2,626.9	32,416.4
2004	5,969.2	625.0	5,344.1	36,670.1	2,707.4	33,962.7

Annual growth rates

2000	5.3	5.3	5.2	6.9	4.3	7.2
2001	4.7	5.6	4.6	3.6	4.6	3.5
2002	1.6	2.3	1.5	2.3	0.3	2.5
2003	4.7	7.1	4.4	1.5	0.6	1.6
2004	5.6	6.9	5.4	4.6	3.1	4.8

Monthly data

Jun-04	490	53	440	3,045	228	2,817
Jul-04	490	53	438	3,043	231	2,811
Aug-04	495	51	444	3,110	223	2,887
Sep-04	504	52	452	3,069	224	2,845
Oct-04	505	53	452	3,067	226	2,841
Nov-04	528	52	476	3,160	219	2,942
Dec-04	499	52	447	3,034	226	2,809
Jan-05	526	53	473	3,186	227	2,959
Feb-05	548	50	498	3,232	224	3,009
Mar-05	532	43	489	3,164	229	2,934
Apr-05	549	45	504	3,142	227	2,915
May-05	581	48	533	3,224	225	2,999
Jun-05	579	46	533	3,246	229	3,018

Month-over-month growth rates

Jun-04	0.4	0.4	0.4	0.0	-0.7	0.1
Jul-04	-0.6	-0.4	-0.6	-0.1	1.5	-0.2
Aug-04	1.1	-3.3	1.6	2.2	-3.6	2.7
Sep-04	1.8	2.2	1.8	-1.3	0.4	-1.4
Oct-04	0.2	2.8	-0.1	-0.1	1.2	-0.2
Nov-04	4.5	-2.5	5.3	3.0	-3.3	3.5
Dec-04	-5.4	-0.3	-6.0	-4.0	3.1	-4.5
Jan-05	5.3	1.3	5.8	5.0	0.6	5.4
Feb-05	4.3	-5.2	5.3	1.5	-1.4	1.7
Mar-05	-2.9	-13.0	-1.9	-2.1	2.4	-2.5
Apr-05	3.0	3.1	3.0	-0.7	-1.0	-0.7
May-05	5.9	8.0	5.7	2.6	-0.8	2.9
Jun-05	-0.4	-5.1	0.1	0.7	1.6	0.6

¹Source: Statistics Canada & BC Stats.

Explanatory Notes

Data Sources

All room revenue data reported is compiled by BC STATS using the hotel tax database maintained and administered by the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Traveller Entry data is from Statistics Canada. All other data sources are accredited within the report.

Accommodation Categories

Each property has been assigned to one of eight accommodation categories. In addition to motels and four sizes of hotels, there are three special accommodation categories:

Fishing Lodges – All inland and coastal fishing camps located on or near lakes, rivers and oceans. Includes lodges which offer inland fishing expeditions, marinas with accommodation and lodges offering the services of fishing guides.

Vacation Rentals – Includes beach houses, cabins, and selected trailer parks. May also include certain inns and apartment complexes.

Miscellaneous – Includes guest ranches; outfitting, adventure hunting and other types of outdoor adventure; lodges that cater to skiers, hikers, etc. (with the exception of those lodges that mainly service cabins); bed and breakfasts; and houseboats. Also includes universities, mining firms, farms and other establishments renting rooms whose primary activity is not accommodation.

Seasonally Adjusted Data

Accommodation revenue exhibits large, regular seasonal fluctuations, characterised by peaks in the summer months and troughs in the winter months.

The *Tourism Sector Monitor* report uses Statistics Canada's X11/ARIMA/88 technique to remove the effects of seasonality from the revenue time series. The resulting seasonally adjusted series provides a useful tool for the analysis of underlying trends in accommodation revenue.

Unless otherwise indicated, revenue data in the *Tourism Sector Monitor* report is adjusted for seasonal fluctuations.

Tourism Sector Monitor is prepared by BC STATS, Ministry of Management Services, using data from the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Visit BC STATS on the World Wide Web at www.bcstats.gov.bc.ca

Limitations

The data reported here is derived from the hotel tax database. Tax is not payable for several kinds of accommodation, including:

1. properties with three or fewer rooms (such as small bed and breakfast operations);
2. room rentals exceeding one month in duration;
3. lodging where the daily rate is below \$20;
4. lodging supplied to passengers of a ship or train while the ship or train is in transit or is making a scheduled stopover in the Province;
5. lodging supplied by employers to employees; and,
6. lodging supplied to consular employees and their staff.

Readers wishing more information regarding the nature of the hotel tax are referred to the Hotel Room Tax Act and the Hotel Room Tax Regulations.

Room Counts

Data are obtained primarily from Tourism BC's *Accommodation Guide* and supplemented by estimates from the Consumer Taxation Branch's hotel tax file. Vendors and their rooms are not counted in any given month unless revenue has been reported.

Suppression

The protection of confidentiality requires the suppression of categories not containing at least four properties. In most cases, protection is achieved by aggregating confidential cells into larger categories.

Revisions

A standard revision cycle accommodates corrections to the source data, to the allocation of consolidated reporters, and to the coding of properties by accommodation type. Revisions are implicit in the seasonally adjusted data and in the month-over-month, year-over-year and year-to-date percentage changes of subsequent reports, and are comprehensively reported in the annual tables published in the Annual issue of the *Tourism Sector Monitor* report.

NUMBER

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Tourism Sector Monitor ♦ September 2005

Room Revenue

Room revenues edged down (-0.1%, *seasonally adjusted*) in June, after increasing 3.5% in the previous month. Except for Mainland Southwest (+1.6%) and Northeast (+2.8%), revenues were down in all regions of the province, led by Nechako (-17.0%) and North Coast (-11.7%). Thompson-Okanagan (-3.3%) and Kootenay (-0.7%) also experienced declines in revenues. Cariboo (-3.1%) saw a second successive decline.

Room revenues slipped in June

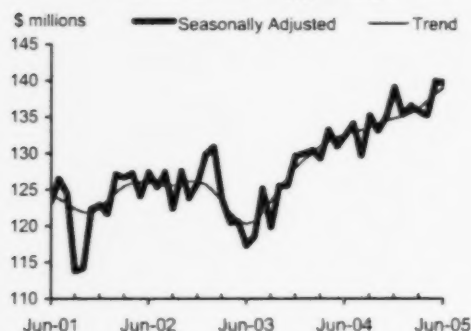


Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type			
	June 05 (\$000)	May 05 (\$000)	% change
Total	139,712	139,908	-0.1
Hotels	103,047	102,915	+0.1
Motels	17,153	18,227	-5.9
Other Acc.	19,833	19,545	+1.5
Regions (Top 3 performers)			
Northeast	5,251	5,107	+2.8
Mainland/Southwest	74,928	73,739	+1.6
Kootenay	6,448	6,494	-0.7

Although large hotels with more than 250 rooms (+1.2%) and hotels with 76 to 150 (+0.3%) rooms saw growth in June, they were offset by the declines in revenues from midsize (-1.5%, 150-250 rooms) and small (-1.0%, 1-75 rooms) hotels. Both motels (-5.9%) and miscellaneous properties (-8.2%, including fishing lodges) were not as busy in June. Vacation rental (+10.3%) revenues continued to climb.

Visitor Entries

Visitor entries to Canada through BC border crossings edged down 0.3% (*seasonally adjusted*) in June with fewer visitors from all areas except Asia (+1.1%). Visitor entries from Europe declined (-1.5%), which contributed to a drop in overseas visits (-0.3%). The South Pacific Market was off 8.2%, dragged down by fewer entries from Australia (-5.3%). US entries decreased (-0.4%) in June. An increase in same day (+1.6%) trips was offset by a decline in overnight (-2.1%) travel.

The number of Canadians re-entering the country through BC borders decreased (-2.6%) in June, after falling 1.5% in May.

Visitor entries edged down

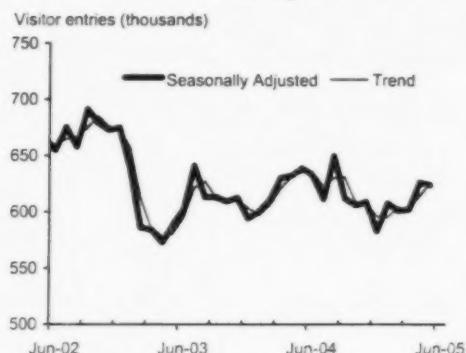


Table 2. Traveller Entries
(seasonally adjusted)

	Jun-05 ('000)	May-05 ('000)	% chg from May-05
American visitors			
Total	494	496	-0.4
Same-day	205	202	1.6
Overnight	291	297	-2.1
Overseas visitors			
Total	130	130	-0.3
Europe	42	43	-1.5
UK	21	22	-2.0
Asia	65	64	1.1
Japan	24	24	-0.5
Taiwan	8	8	3.6
Oceania	14	15	-8.2

(BC STATS & Statistics Canada)

Note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Other Indicators

Other tourism indicators gave mixed signals in June.

The occupancy rate in BC hotels was off (-1.0%), while room prices were up 0.9%. The Consumer Price Index for traveller accommodation also fell (-0.6%) for the fifth consecutive month.

Passenger traffic was down 1.4% at the Vancouver airport, but increased 1.2% in Victoria. Fewer vehicles (-2.2%) passed the toll booth of the Coquihalla highway in June. In addition, both vehicle (-1.2%) and passenger (-2.2%) volumes aboard BC Ferries were down.

The restaurant food price index climbed up (+1.1%), however, restaurant, caterer and tavern receipts fell 3.3% in June, due to a substantial drop in sales at BC's drinking places (-6.8%) and food services establishments (-2.9%).

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Jun-05	May-05	Change from
Hotel Industry			
Occupancy rate	64.7		-1.0 pp.
Average room charge	117.20		0.9%
(Pannell Kerr Forster)			
Airport Passengers	(000s)	(%)	
Vancouver International Airport			
Total traffic	1,377		-1.4
US (trans-border)	330		-5.7
Other International	342		-2.8
Canada (domestic)	705		1.5
(YVR)			
Victoria International Airport			
Total traffic	110		1.2
(Victoria Airport Authority)			
Restaurant Receipts	(\$ millions)	(%)	
All establishments	517		-3.3
Food service	470		-2.9
Drinking places	47		-6.8
(Statistics Canada)			
Transportation	(000s)	(%)	
Coquihalla Highway			
Passenger Vehicles	224		-2.2
(Ministry of Transportation & Highways)			
BC Ferries			
Vehicle Volume	716		-1.2
Passenger Volume	1,821		-2.2
(BC Ferries)			
Exchange Rates	Cdn \$		
US \$	0.806		0.01
UK Pound	0.444		0.01
Japanese Yen	87.681		2.77
Australian \$	1.052		0.01
(Statistics Canada)			

Note: pp. percentage points

Note to readers: all data in the *Tourism Sector Monitor* are reported on a seasonally adjusted basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues edged down (-1.2%, seasonally adjusted) in July as four out of eight regions lost ground.

Province-wide, revenues were flat at most hotels, declining 0.4% overall. Big hotels (250+ rooms, -4.3%) were not as busy as in June (+1.2%), while midsize hotels (76-150 rooms, +0.2%) fared generally well in July. Vacation rentals (-0.7%), small hotels (1-75 rooms, -0.8%), and non-standard accom-

modation (-0.9%, including fishing lodges, bed and breakfast and other short term accommodations) fell.

Visitor entries were also off (-0.8%, *seasonally adjusted*) in July as fewer visitors came from US (-0.8%) and overseas (-1.0%).

Passenger traffic was virtually unchanged at the Vancouver airport, but Victoria's airport (-3.4%) was not as busy in July. There were fewer passengers (-1.3%) and vehicles (-1.0%) aboard BC Ferries.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

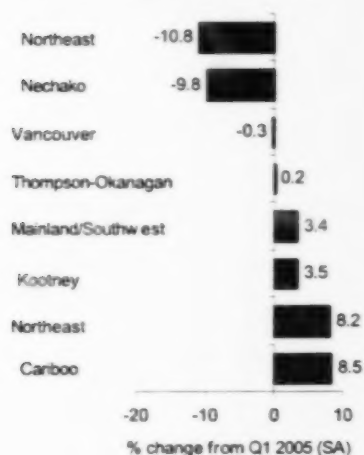
How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

Special Focus: Second Quarter Review of BC's tourism Sector

Room Revenues continued to climb

Room revenues rose (+1.8%, seasonally adjusted) in the second quarter, posting an eighth consecutive quarterly gain. Revenues increased in five regions, but the distribution of the growth was different from the first quarter. Revenues were down in Nechako (-9.8%), Northeast (-10.8%), and Vancouver Island/Coast (-0.3%), which had posted the most significant growth at the beginning of 2005.

Revenues jumped in Cariboo and Northeast

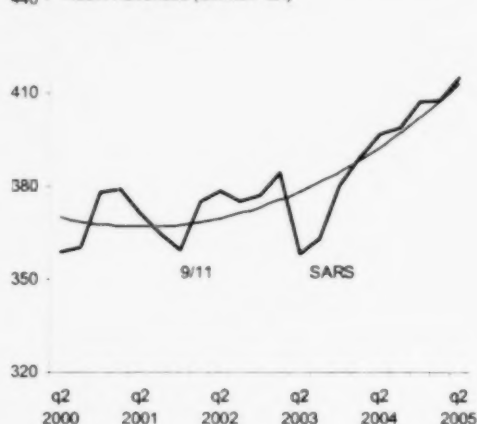


Data source: BC Stats

However, the revenue growth in the other regions offset the declines. Cariboo (+8.5%) and Northeast (+8.2%) posted the strongest growth in the second quarter. Room revenues in Kootenay (+3.5%) and Mainland (+3.4%) bounced back after dropping in the first quarter. Thompson/Okanagan posted a modest 0.2% gain.

Persistent growth in BC room revenues

440 Room Revenues (\$million SA)

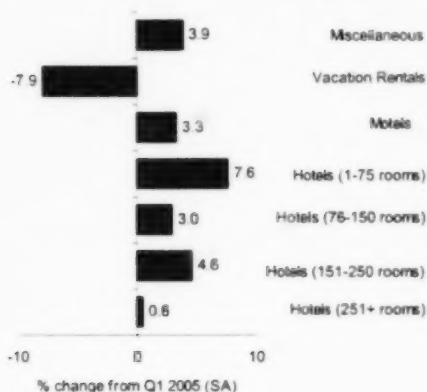


Data source: BC Stats

In the second quarter, revenues reached a new high of \$415 million, with an increase at hotels of all sizes. Very large (251+ rooms, +0.6%) and large (151-250 rooms, +4.6%) hotels recovered from a weak first quarter. Small hotels (1-75 rooms, +7.6%), mid-sized hotels (76-150 rooms, +3.0%), and motels (+3.3%) continued to do well.

Business was much slower at vacation rentals, posting a substantial decline (-7.9%). However, other types of accommodations, including bed and breakfast, fishing lodges and other kinds of short-term accommodations, saw room revenues grow 3.9%.

Small hotels posted the strongest growth



Data source: BC Stats

Visitor entries rose in the second quarter

Visitor entries to Canada through BC border crossings rose in the second quarter (+1.1%, seasonally adjusted), after three consecutive quarterly declines. The number of overseas visitors was up 3.0%, accompanied by a 0.6% increase in entries from the US. Same-day visits by Americans were up 2.1%, offsetting a slump (-0.4%) in overnight traffic in the second quarter.

Overseas entries increased (+3.0%), with more visitors from Europe (+1.2%) and Asia (+5.6%). However visits from Oceania (Australia and South Pacific, -0.7%) slipped. Among the overseas markets, Hong Kong (+18.0%) and Taiwan (+10.2%) recorded the highest growth in the second quarter.

The number of Canadians re-entering the country via BC border crossings continued to rise (+1.0%). More Canadian travelled overseas (+2.9%) or made same-day auto trips to the US (+0.6%).

US entries climbed up, but remained low by historical standards



Data source: BC Stats

Other Indicators

Hotel occupancy rates averaged 64.5% (seasonally adjusted) in the second quarter, increasing 0.6%. Average room rates, at \$115.7, were up 3.8% compared with the first quarter.

Air passenger traffic at Vancouver airport increased +0.5%, while Victoria (-0.7%) experienced lower volumes on all types of flights. BC Ferries were busy, carrying more passengers (+1.7%) and vehicles (+1.4%). Traffic on the Coquihalla Highway was up substantially (+2.6%).

Employment in the major tourism-related industries edged up (+0.1%) in the second quarter of 2005. The accommodation (+1.9%) and air transport (+0.3%) industries increased employment moderately, while the number of people working in arts, entertainment & recreation remained virtually unchanged.

Restaurant, caterer and tavern receipts continued to climb up (+1.2%) in the second quarter, as an increase in revenues at food service establishments (+2.5%) offset lower receipts at drinking places.

Hot topic: Hurricane Devastates Tourism Industry in Louisiana

Hurricane Katrina, the most devastating disaster in US history, has torn through the Gulf Coast states, killing many people, leaving about 80% of New Orleans underwater, and destroying many homes. It also hit northern Florida and the Pensacola region, but resorts on the Gulf coast such as Clearwater and St Petersburg, except for some heavy rains, were relatively untouched and are functioning quite normally. However, according to MSNBC news, tourism, a major source of revenue in Louisiana, has been blown away by the hurricane.

New Orleans alone drew more than 10 million visitors last year, creating approximately 80,000 tourism-related jobs. "Visitors to New Orleans spend \$5 billion per year, and 40% of that number is convention and meeting business," said Donna Karl, vice president of client relations for the New Orleans Metropolitan Convention and Visitors Bureau, who spoke from Chicago. With most of the regions underwater, that part of tourism revenue is long gone.

The disintegration of New Orleans' tourism sector has affected the airline industry, which has been forced to cancel many flights to the city. With large areas of the city still closed to the public, many hotels, restaurants and other tourism venues are not yet operating normally. Tourists planning trips to New Orleans have likely made alternative arrangements.

New Orleans had a 12-month hotel room revenue of more than \$1 billion. But now, almost all of the city's 265 hotels, including all three major U.S. hotel companies: Hilton Hotels Corp, Marriott International Inc., and Starwood Hotels & Resorts Worldwide Inc. have closed their properties in the region; many of their 38,633 hotel rooms have been damaged or left out of order.

The hurricane's effects may be long-lasting. It will take some time before business is back to normal in the state, and until then, it is likely that leisure travel from the affected regions will be greatly reduced, as individuals and business operators focus on rebuilding rather than foreign-travel.

How is this likely to affect the Canadian tourism sector? There is not a lot of recent information about travel to and from Louisiana. However, according to Statistics Canada, Louisiana sent 24,000 travellers to Canada in the second quarter of 2001, almost three times as many as in 2000. Nevertheless, Louisiana is neither one of the top 12 states visited by Canadians nor one of the top 10 U.S. states that have sent visitors to Canada. As a result, the hurricane disaster would not be likely to have huge effects on the tourism industry in Canada. On the other hand, the big hikes in North American gasoline prices and the prospect of bankruptcies in the US airline industry may influence the travel plans of America from states not directly affected by the hurricane.

With Hurricane Rita arriving in Texas, the tourism industry in Canada would be affected more visibly because Texas is one of the top 12 states of origin for US tourists to Canada (Statistics Canada, 2003). Additionally, the threat on oil and gas prices could further affect travelling from the states where the hurricane hit.

Table 1: Room Revenue by Development Region (\$000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,244	863,420	229,533	76,892	46,181	20,127	8,811	51,889	1,592,097

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	3.9	-1.3	12.2	7.1

Monthly data

Jun-04	24,448	72,218	19,188	6,292	3,793	1,692	745	4,044	132,421
Jul-04	24,601	73,166	19,352	6,519	3,782	1,757	740	4,134	134,051
Aug-04	24,488	70,253	18,348	6,192	3,837	1,717	725	4,077	129,638
Sep-04	25,145	73,658	19,301	6,468	3,821	1,654	772	4,340	135,157
Oct-04	24,690	71,416	19,088	6,285	3,911	1,704	737	5,270	133,101
Nov-04	25,217	71,672	19,950	6,517	3,949	1,744	766	5,218	135,032
Dec-04	26,248	74,358	20,275	6,283	4,741	1,533	789	4,805	139,032
Jan-05	26,022	71,282	20,323	6,254	3,888	1,628	842	5,013	135,252
Feb-05	25,536	70,824	20,966	6,171	4,225	1,700	1,026	6,077	136,526
Mar-05	26,632	70,093	21,193	6,115	4,179	1,738	1,007	4,762	135,720
Apr-05	26,004	70,744	20,973	6,328	4,740	1,677	916	3,779	135,161
May-05	26,091	73,739	21,175	6,494	4,366	2,019	916	5,107	139,908
Jun-05	25,827	74,928	20,484	6,448	4,229	1,784	760	5,251	139,712

Month-over-month growth rates

Jun-04	2.7	-0.5	1.5	6.8	4.5	5.6	3.6	7.1	1.2
Jul-04	0.6	1.3	0.9	3.6	-0.3	3.8	-0.7	2.2	1.2
Aug-04	-0.5	-4.0	-5.2	-5.0	1.4	-2.2	-2.1	-1.4	-3.3
Sep-04	2.7	4.8	5.2	4.5	-0.4	-3.7	6.5	6.4	4.3
Oct-04	-1.8	-3.0	-1.1	-2.8	2.4	3.0	-4.5	21.5	-1.5
Nov-04	2.1	0.4	4.5	3.7	1.0	2.3	3.9	-1.0	1.5
Dec-04	4.1	3.7	1.6	-3.6	20.1	-12.1	3.0	-7.9	3.0
Jan-05	-0.9	-4.1	0.2	-0.5	-18.0	6.2	6.7	4.3	-2.7
Feb-05	-1.9	-0.6	3.2	-1.3	8.7	4.4	21.9	21.2	0.9
Mar-05	4.3	-1.0	1.1	-0.9	-1.1	2.2	-1.8	-21.6	-0.6
Apr-05	-2.4	0.9	-1.0	3.5	13.4	-3.5	-9.1	-20.6	-0.4
May-05	0.3	4.2	1.0	2.6	-7.9	20.4	0.0	35.1	3.5
Jun-05	-1.0	1.6	-3.3	-0.7	-3.1	-11.7	-17.0	2.8	-0.1

June month-over-month percent growth

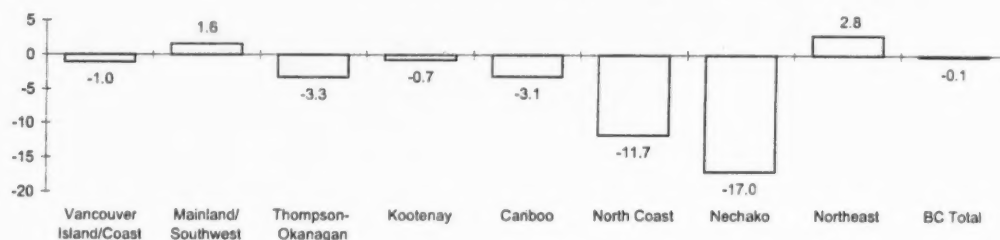


Table 2: Room Revenue by Accommodation Type (\$000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous Incl. Fishing Lodges
	251+	151-250	76-150	1-75			

Annual data

2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423
2004	467,820	198,608	321,879	185,692	195,041	124,433	98,824

Annual growth rates

2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
2004	6.8	9.8	8.2	6.6	7.5	4.1	3.6

Monthly data

Jun-04	39,336	16,771	26,833	15,446	16,120	9,966	8,104
Jul-04	39,462	16,529	27,135	15,784	16,508	10,426	8,437
Aug-04	37,882	16,316	26,177	15,365	15,485	10,343	8,245
Sep-04	39,552	17,056	27,127	15,918	16,310	10,625	8,666
Oct-04	37,685	16,610	27,036	16,016	16,423	11,298	8,299
Nov-04	37,940	17,799	27,933	15,755	17,768	11,126	8,568
Dec-04	41,718	17,348	27,289	15,578	17,153	11,267	8,348
Jan-05	38,570	18,569	27,151	15,063	16,806	11,283	7,987
Feb-05	38,244	17,011	27,654	15,873	17,338	10,779	8,220
Mar-05	38,328	17,043	27,911	16,696	17,804	10,239	8,304
Apr-05	37,299	17,701	27,749	16,542	18,093	8,224	7,621
May-05	39,018	17,767	28,687	17,444	18,227	10,237	9,308
Jun-05	39,496	17,509	28,774	17,269	17,153	11,288	8,545

Month-over-month growth rates

Jun-04	-0.8	2.9	0.5	1.5	1.1	-4.1	7.4
Jul-04	0.3	-1.4	1.1	2.2	2.4	4.6	4.1
Aug-04	-4.0	-1.3	-3.5	-2.7	-6.2	-0.8	-2.3
Sep-04	4.4	4.5	3.6	3.6	5.3	2.7	5.1
Oct-04	-4.7	-2.6	-0.3	0.6	0.7	6.3	-4.2
Nov-04	0.7	7.2	3.3	-1.6	8.2	-1.5	3.2
Dec-04	10.0	-2.5	-2.3	-1.1	-3.5	1.3	-2.6
Jan-05	-7.5	-4.5	-0.5	-3.3	-3.2	0.1	-4.3
Feb-05	-0.8	2.7	1.9	5.4	4.4	-4.5	2.9
Mar-05	0.2	0.2	0.9	5.2	2.7	-5.0	1.0
Apr-05	-2.7	3.9	-0.6	-0.9	1.6	-19.7	-8.2
May-05	4.6	0.4	3.4	5.5	0.7	24.5	22.1
Jun-05	1.2	-1.5	0.3	-1.0	-5.9	10.3	-8.2

June month-over-month percent growth

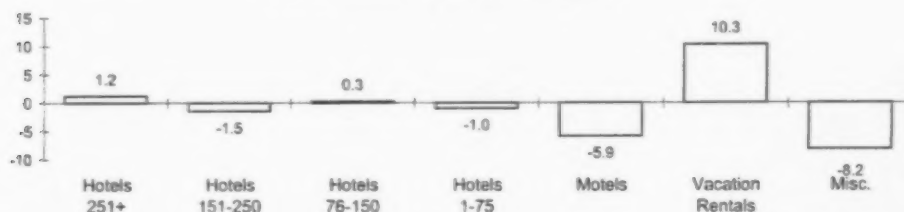


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Jun-05	YTD 05	Jun-04	YTD 04	Jun-05	Jun-04	Jun-05	Jun-04
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	18,848	74,634	2.8	8.5	190	3	8,490	167
Total - Hotels	15,478	62,368	4.5	8.5	70	2	5,653	107
76+ Rooms	11,845	47,934	2.7	6.6	26	0	3,937	0
1-75 Rooms	3,633	14,435	10.7	15.2	44	2	1,716	107
Motels	1,621	6,248	7.4	11.0	29	0	1,134	47
Vacation Rentals	533	1,948	-8.2	4.5	30	3	357	14
19 Cowichan Valley								
Total - All accommodation types	960	3,917	8.1	9.9	38	2	685	20
Motels	255	992	46.8	16.7	17	2	331	34
21 Nanaimo								
Total - All accommodation types	4,281	17,126	13.7	10.5	76	-4	2,529	-173
Total - Hotels	2,031	9,143	11.8	9.6	18	-2	1,126	-140
Motels	846	3,394	-0.9	9.9	27	1	660	-12
Vacation Rentals	1,032	3,735	33.3	13.2	21	-1	590	-11
23 Alberni-Clayoquot								
Total - All accommodation types	4,118	15,287	4.3	11.0	71	3	1,534	42
Total - Hotels	971	3,748	-5.7	-1.8	12	0	432	19
Motels	424	1,485	1.7	13.3	21	1	420	15
Vacation Rentals	1,551	5,931	13.0	24.9	17	1	354	14
25 Comox-Strathcona								
Total - All accommodation types	3,496	12,360	15.5	-0.9	86	-5	2,123	0
Fishing lodges	748	1,414	12.9	-0.6	22	-3	395	-16
Motels	800	3,238	5.2	-1.9	26	-1	694	-8
Vacation Rentals	577	1,227	66.2	-12.8	21	-1	258	-2
27 Powell River								
Total - All accommodation types	462	1,651	2.9	-34.6	24	2	455	41
43 Mount Waddington								
Total - All accommodation types	742	1,878	7.1	1.1	29	-1	611	-132
45 Central Coast								
Total - All accommodation types	243	641	-11.2	-6.9	12	0	163	-1
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	3,781	17,288	13.2	2.4	76	4	2,523	-16
Total - Hotels	2,700	12,718	14.2	3.2	18	-2	1,349	-31
Motels	799	3,516	7.2	11.6	39	-1	962	-27
15 Greater Vancouver								
Total - All accommodation types	72,751	299,543	4.2	4.8	251	1	27,243	-52
Total - Hotels	68,139	280,308	4.3	3.4	162	2	23,050	-196
251+ Rooms	36,094	150,895	-0.9	-0.1	23	-2	9,252	-704
151-250 Rooms	13,228	53,799	5.7	5.7	27	2	5,185	433
76-150 Rooms	13,627	56,336	11.6	8.6	52	-2	5,668	-181
1-75 Rooms	5,189	19,279	24.3	12.3	60	4	2,945	256
Motels	1,878	8,011	8.5	12.2	36	-1	1,597	-20
Vacation Rentals	882	6,731	-3.3	83.8	21	1	752	168
29 Sunshine Coast								
Total - All accommodation types	487	1,805	29.7	13.4	23	-1	400	-6
31 Squamish-Lillooet								
Total - All accommodation types	8,116	102,194	0.8	-11.0	102	1	7,230	-315
Total - Hotels	6,929	82,541	-0.1	-10.3	45	-1	5,374	-329
76-150 Rooms	1,511	20,059	-10.0	-14.5	15	0	1,514	-5
1-75 Rooms	487	5,861	-4.8	-24.5	20	0	731	-24
Vacation Rentals	766	14,322	23.8	-11.7	31	4	1,276	84
Miscellaneous	268	4,579	-16.8	-20.0	18	-2	408	30
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	4,336	13,968	11.0	7.6	116	-5	3,187	-115
Total - Hotels	2,118	7,459	10.6	0.7	15	-2	1,074	-91
Motels	1,679	4,747	10.5	8.9	74	-4	1,721	-61

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Jun-05	YTD 05	Jun-04	YTD 04	Jun-05	Jun-04	Jun-05	Jun-04
33 Thompson-Nicola								
Total - All accommodation types	7,996	31,182	9.5	3.7	175	4	5,724	41
Total - Hotels	3,263	14,034	-1.8	2.9	35	0	2,232	-38
78+ Rooms	2,591	11,395	-1.0	2.9	12	0	1,388	-1
1-75 Rooms	671	2,639	-4.9	3.0	23	0	844	-25
Motels	2,373	8,340	-1.7	4.2	81	5	2,363	49
Vacation Rentals	602	6,174	10.5	1.3	20	-1	518	-5
35 Central Okanagan								
Total - All accommodation types	7,158	33,174	13.8	13.8	64	-3	3,483	-53
Total - Hotels	5,075	22,163	14.2	12.0	19	1	1,710	4
Motels	1,294	4,823	7.6	-0.6	25	-4	1,104	-70
Vacation Rentals	481	5,373	7.3	36.4	14	-1	227	-12
37 North Okanagan								
Total - All accommodation types	1,555	11,198	20.4	19.4	45	-3	1,419	-78
Total - Hotels	853	7,006	24.0	20.2	10	0	737	0
Motels	715	2,976	18.2	22.2	19	-1	586	-66
39 Columbia-Shuswap								
Total - All accommodation types	3,574	16,816	7.4	13.9	109	3	3,342	89
Total - Hotels	1,692	6,690	3.7	6.7	19	1	1,232	12
Motels	1,403	5,351	5.3	6.6	49	-2	1,509	-61
Miscellaneous	128	3,668	106.9	38.8	22	5	370	102
Kootenay								
01 East Kootenay								
Total - All accommodation types	3,741	25,523	-2.8	-5.8	116	-4	4,490	-74
Total - Hotels	1,144	9,088	-7.1	8.2	24	0	1,399	4
Motels	1,047	4,531	-1.0	1.1	51	-1	1,187	-47
Vacation Rentals	636	9,751	18.8	-19.0	17	1	904	-9
03 Central Kootenay								
Total - All accommodation types	1,783	8,110	5.0	5.9	88	5	1,658	12
Total - Hotels	948	4,505	5.3	5.7	19	0	776	-15
Motels	418	1,968	-0.2	12.0	33	1	562	1
Vacation Rentals	150	564	3.5	23.8	19	0	153	12
05 Kootenay Boundary								
Total - All accommodation types	575	2,796	28.2	-8.5	39	1	724	48
Motels	338	1,333	18.9	0.2	24	0	408	0
Cariboo								
41 Cariboo								
Total - All accommodation types	2,848	7,607	7.4	9.9	110	-9	2,189	-71
Fishing lodges	142	229	-6.1	0.1	18	2	170	14
Motels	1,007	4,290	11.1	14.0	35	-1	1,023	-9
Vacation Rentals	150	277	-10.4	-2.2	32	-5	323	-32
53 Fraser-Fort George								
Total - All accommodation types	3,197	15,281	14.5	19.6	60	2	2,787	78
Total - Hotels	2,267	11,127	14.1	20.7	19	1	1,474	82
Motels	866	3,616	16.6	19.4	30	0	987	-8
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	2,101	4,754	11.4	4.4	43	2	1,177	22
Motels	365	944	17.6	-2.8	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	819	3,971	-8.4	8.5	40	0	816	-40
Motels	264	1,489	-19.6	13.9	17	0	302	-27
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	999	4,451	1.6	24.9	53	-5	1,157	-74
Motels	577	2,421	4.6	18.2	24	-2	638	-57
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	4,150	33,373	28.4	25.4	66	-2	2,844	-625
Total - Hotels	2,389	14,642	30.0	17.5	23	1	1,579	65
Motels	1,208	6,968	13.3	23.2	34	0	914	-29

** Data for regions with fewer than 10 properties reporting can not be released.

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Jun-05	YTD 05	Jun-04	YTD 04	Jun-05	Jun-04	Jun-05	Jun-04
Vancouver Island/Coast	33,151	127,494	5.6	7.3	526	0	16,590	-36
Victoria (C)	15,226	60,916	5.5	9.1	92	4	5,885	275
Other CRD	2,760	10,109	-13.9	-2.0	87	-1	2,253	-128
Nanaimo (C)	2,312	10,197	13.7	15.6	25	1	1,244	0
Port Alberni (C)	395	1,671	-10.8	12.7	15	1	405	30
Courtenay (C)	812	4,107	15.4	6.2	13	1	464	-25
Rest of Development Region	11,645	40,496	10.3	5.2	307	-5	6,339	-188
Mainland/Southwest	83,136	429,838	4.3	0.4	452	5	37,396	-289
Downtown Vancouver (C)	47,196	186,937	0.7	1.6	87	5	12,991	216
Other Vancouver (C)	4,171	19,004	20.1	39.2	37	-2	2,868	139
Richmond (C)	10,848	47,999	12.9	8.2	26	1	4,387	50
Burnaby (C)	2,463	11,671	-8.7	-5.8	12	0	1,379	134
Other GVRD	8,074	33,932	12.3	8.6	89	-3	5,618	-201
Whistler (DM)	7,491	98,592	1.0	-11.7	74	-2	6,495	-380
Rest of Development Region	4,893	22,695	12.5	5.0	127	6	3,658	-247
Thompson/Okanagan	23,639	106,646	8.5	10.3	500	-4	17,055	-146
Penticton (C)	2,483	8,225	11.5	1.5	47	-2	1,709	-90
Kamloops (C)	4,802	24,364	-3.9	1.2	71	1	3,684	12
Kelowna (C)	6,339	30,972	15.0	15.4	49	-2	2,938	-11
Vernon (C)	1,526	10,737	22.3	19.9	27	-1	1,231	-63
Revelstoke (C)	1,214	6,638	2.9	7.2	31	2	1,285	20
Rest of Development Region	7,455	25,110	9.7	14.4	284	-2	6,228	-14
Kootenay	6,019	36,429	1.7	-2.9	243	5	6,872	-22
Cranbrook (C)	768	3,650	-10.9	9.7	18	0	890	0
Nelson (C)	532	2,695	0.9	-4.9	12	0	425	0
Rest of Development Region	4,719	30,084	4.2	-4.0	225	5	5,982	-22
Cariboo	5,245	22,888	11.6	16.2	170	-7	4,975	7
Quesnel (C)	368	1,728	12.9	8.6	12	-1	443	-9
Williams Lake (C)	535	2,326	12.5	15.4	12	0	574	0
Prince George (C)	2,327	11,850	12.7	20.6	33	2	2,024	78
Rest of Development Region	2,015	6,984	10.0	11.4	113	-8	1,934	-62
North Coast	2,920	8,725	4.8	6.3	83	3	2,043	-10
Prince Rupert (C)	964	2,985	5.5	1.3	16	0	773	0
Terrace (C)	451	2,395	-5.4	11.3	13	1	426	8
Rest of Development Region	1,505	3,345	7.8	7.5	54	2	844	-18
Nechako	909	4,451	1.6	24.9	53	-5	1,157	-74
Smithers (T)	448	2,324	-2.3	39.3	13	0	424	0
Rest of Development Region	551	2,127	5.0	12.3	40	-5	733	309
Northeast	4,159	33,373	28.4	25.4	66	-2	2,844	-625
Dawson Creek (C)	721	4,162	22.6	36.3	13	0	471	-13
Fort St. John (C)	1,488	14,996	34.1	10.5	16	-1	930	-60
Rest of Development Region	1,941	14,213	26.6	42.5	37	-1	1,443	-552

* Data for regions with fewer than 10 properties reporting can not be released.

Table 5: Historical Unadjusted Room Revenue by Development Region (\$000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson/ Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	48,266	1,486,681
2004	295,244	863,420	229,533	76,892	48,181	20,127	8,811	51,889	1,592,097

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	3.9	-1.3	12.2	7.1

Monthly data

Jun-04	31,360	81,605	21,957	5,917	4,699	2,786	984	3,231	152,559
Jul-04	44,238	98,089	37,609	9,647	5,481	3,434	1,051	3,896	203,445
Aug-04	49,430	101,817	37,115	10,120	6,109	3,253	1,100	4,029	212,973
Sep-04	35,179	81,870	23,602	7,603	5,234	2,334	1,172	4,075	161,067
Oct-04	20,981	55,010	13,961	4,252	3,996	1,251	886	5,132	105,468
Nov-04	13,405	43,212	8,484	2,886	2,856	959	570	4,183	76,555
Dec-04	13,224	64,448	12,659	4,875	2,804	685	469	3,971	103,134
Jan-05	11,280	61,240	13,166	5,699	2,447	729	486	5,918	100,965
Feb-05	14,443	68,394	16,512	7,347	2,830	1,027	666	9,234	120,452
Mar-05	19,694	72,544	19,344	7,273	3,540	1,143	841	7,407	131,786
Apr-05	21,271	60,174	13,445	4,820	4,213	1,013	638	3,458	109,033
May-05	27,655	73,343	19,759	5,271	4,613	1,894	621	3,206	136,561
Jun-05	33,151	85,136	23,820	6,019	5,245	2,920	999	4,150	161,439

Year-over-year percent changes

Jun-04	9.0	17.0	2.6	5.0	4.8	6.8	6.0	12.0	11.8
Jul-04	12.4	13.9	14.4	11.6	6.0	10.7	-0.7	3.6	13.0
Aug-04	5.2	0.6	0.2	1.5	9.7	4.7	-3.6	1.3	1.9
Sep-04	11.8	12.8	17.9	14.1	9.6	-0.2	7.4	15.2	13.1
Oct-04	5.4	5.2	1.2	0.2	5.9	3.7	-8.0	48.5	5.9
Nov-04	5.1	4.3	5.5	16.2	8.9	6.2	5.9	41.0	6.7
Dec-04	12.4	8.6	8.6	-3.0	27.5	-17.5	3.4	4.4	8.5
Jan-05	3.6	2.9	5.1	-3.0	7.5	-7.8	17.1	33.7	4.4
Feb-05	2.3	-0.1	9.5	-10.2	15.5	-0.6	45.0	46.0	3.7
Mar-05	13.9	-2.4	22.5	-6.4	9.8	9.9	65.8	12.8	4.1
Apr-05	9.1	-5.2	5.9	-3.7	30.7	-4.1	17.1	-5.5	-0.1
May-05	8.0	2.5	9.5	10.7	20.4	25.9	25.9	33.7	6.4
Jun-05	5.6	4.3	8.5	1.7	11.6	4.8	1.6	28.4	5.8

June year-over-year percent change

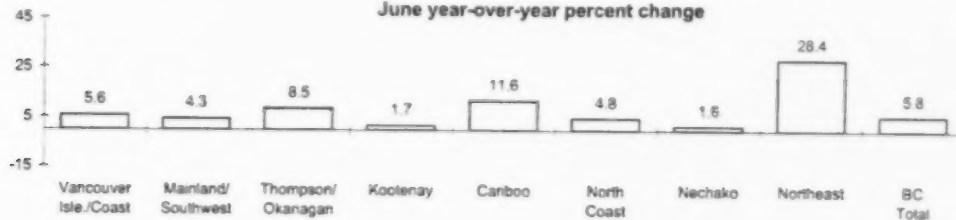


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**

Annual data

2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,970.8	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.8	118.0
2003	7,335.3	6,137.4	2,580.7	3,556.7	1,197.8	577.6	410.1	124.8
2004	7,427.8	6,022.5	2,477.6	3,561.5	1,405.3	715.8	458.1	144.3

Annual percent changes

2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.1	-4.3	-13.6	4.2	-3.0	4.4	-11.7	-10.5
2003	-8.0	-7.0	-8.1	-6.1	-12.9	-24.4	-0.4	5.8
2004	1.3	-1.9	-4.0	0.1	17.3	23.9	11.7	15.6

Monthly data

Jul-04	632.9	510.3	207.4	299.7	122.5	60.9	41.4	12.6
Aug-04	611.3	494.0	197.7	293.3	117.3	56.3	38.7	12.5
Sep-04	649.6	529.7	201.2	312.0	119.8	58.3	40.5	12.6
Oct-04	611.8	493.2	206.2	291.9	118.6	58.5	39.8	11.7
Nov-04	605.9	493.3	203.7	295.5	112.6	56.4	36.2	12.1
Dec-04	609.0	492.9	200.4	291.1	116.1	56.0	39.4	12.2
Jan-05	583.0	467.0	179.5	288.0	116.1	55.1	40.5	12.3
Feb-05	607.8	485.7	198.5	289.3	122.1	61.6	40.6	12.5
Mar-05	601.0	477.5	195.5	283.2	123.5	63.4	42.1	12.2
Apr-05	602.2	475.2	191.4	285.0	127.0	65.1	42.0	12.0
May-05	626.0	496.1	201.5	296.6	130.0	64.2	42.7	15.5
Jun-05	623.9	494.3	204.8	290.5	129.6	64.9	42.1	14.2
Jul-05	618.9	490.5	196.8	292.8	128.3	64.8	42.3	14.1

Month-over-month growth rates

Jul-04	-0.9	-0.3	-1.9	0.7	-3.4	-8.3	5.1	0.6
Aug-04	-3.4	-3.2	-4.7	-2.1	-4.3	-7.5	-6.6	-1.2
Sep-04	6.3	7.2	1.8	6.4	2.2	3.4	4.6	0.6
Oct-04	-5.8	-6.9	2.5	-6.4	-1.1	0.5	-1.7	-7.0
Nov-04	-1.0	0.0	-1.2	1.2	-5.1	-3.6	-9.0	3.3
Dec-04	0.5	-0.1	-1.6	-1.5	3.1	-0.8	8.8	1.1
Jan-05	-4.3	-5.3	-10.5	-1.1	0.0	-1.6	2.9	0.7
Feb-05	4.2	4.0	10.6	0.5	5.2	11.9	0.1	2.0
Mar-05	-1.1	-1.7	-1.5	-2.1	1.2	2.9	3.7	-2.5
Apr-05	0.2	-0.5	-2.1	0.6	2.8	2.7	-0.2	-1.6
May-05	4.0	4.4	5.3	4.1	2.3	-1.5	1.7	28.4
Jun-05	-0.3	-0.4	1.6	-2.1	-0.3	1.1	-1.5	-8.2
Jul-05	-0.8	-0.8	-3.9	0.8	-1.0	-0.1	0.4	-0.4

* Seasonally adjusted totals for US and overseas entries are calculated by Statistics Canada, and are adjusted to sum to national totals. Therefore, same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)				Other Transportation (000s)			
	Vancouver				Victoria Total	BC Ferries		Coquitlam Hwy Passenger Vehicles
	Total	Domestic	Trans- border	Other Int'l.		Vehicles	Passengers	

Annual data

2000	18,033	8,306	4,075	3,652	1,139	7,887	21,280	2,400
2001	15,477	7,869	4,001	3,608	1,158	8,104	21,309	2,481
2002	14,877	7,422	3,855	3,600	1,102	8,272	21,540	2,530
2003	14,321	7,267	3,814	3,241	1,183	8,263	21,348	2,480
2004	15,725	7,986	3,964	3,775	1,250	8,532	21,953	2,586

Annual growth rates

2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.7	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.9	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0
2004	9.8	9.9	3.9	16.5	5.6	3.3	2.8	4.3

Monthly data

Jul-04	1,318	672	325	321	105	713	1,835	220
Aug-04	1,302	657	329	316	100	693	1,786	208
Sep-04	1,347	688	340	320	110	712	1,834	222
Oct-04	1,329	677	337	315	104	718	1,852	215
Nov-04	1,341	683	341	317	105	727	1,865	221
Dec-04	1,349	695	338	317	107	750	1,910	217
Jan-05	1,377	716	344	317	108	682	1,722	206
Feb-05	1,362	705	332	326	111	726	1,858	227
Mar-05	1,380	702	348	329	113	723	1,848	224
Apr-05	1,365	683	341	341	110	720	1,837	222
May-05	1,397	695	350	352	109	725	1,863	229
Jun-05	1,377	705	330	342	110	716	1,821	224
Jul-05	1,378	702	331	345	107	709	1,797	224

Month-over-month growth rates

Jul-04	-0.6	0.2	-0.5	-2.5	2.2	1.0	1.0	3.1
Aug-04	-1.2	-2.2	1.4	-1.7	-5.1	-2.7	-3.8	-5.3
Sep-04	3.4	4.5	3.3	1.3	9.8	2.7	3.9	6.9
Oct-04	-1.3	-1.3	-1.1	-1.6	-5.2	0.8	1.0	-3.1
Nov-04	0.9	0.8	1.4	0.5	1.0	1.3	0.7	2.4
Dec-04	0.7	1.8	-1.0	0.1	2.3	3.2	2.4	-1.6
Jan-05	2.0	3.1	1.8	-0.1	1.0	-9.1	-6.9	-5.2
Feb-05	-1.0	-1.6	-3.5	2.9	2.0	6.5	7.9	10.4
Mar-05	1.3	-0.4	5.0	1.1	1.8	-0.4	-0.6	-1.2
Apr-05	-1.1	-2.7	-2.1	3.4	-2.4	-0.4	-0.5	-1.3
May-05	2.4	1.8	2.6	3.3	-0.8	0.7	1.4	3.5
Jun-05	-1.4	1.5	-5.7	-2.8	1.2	-1.2	-2.2	-2.2
Jul-05	0.0	-0.5	0.4	0.8	-3.4	-1.0	-1.3	-0.3

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel Industry ²		Consumer Price Index ¹	
	Total tourism related	Air transport ⁴	Accommodation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%) ³	Room Rate (\$)	Traveller accommodation	Restaurant food ⁴
Annual data									
2000	188.4	14.8	28.2	116.7	28.8	60.0	114.04	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.13	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	116.99	124.2	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	113.71	111.8	127.6
2004	193.2	13.0	27.6	117.8	34.8	61.5	115.59	102.5	129.9
Annual Growth Rates									
2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.7	0.7	-6.9	3.3
2003	1.1	4.4	-0.7	-0.3	6.8	-1.0	-2.8	-9.9	1.8
2004	0.2	2.2	-4.7	0.0	4.3	5.5	1.7	-8.4	1.8
Monthly data									
Jul-04	191.8	13.0	27.5	116.8	34.5	61.6	115.60	102.6	129.8
Aug-04	194.1	13.2	27.6	117.8	35.4	59.7	115.20	100.8	129.7
Sep-04	193.4	13.2	27.6	116.9	35.7	62.4	115.80	102.2	130.0
Oct-04	192.4	13.3	27.5	116.7	34.9	62.1	114.80	102.1	130.3
Nov-04	193.8	13.2	27.4	117.6	35.5	62.7	115.80	103.2	130.6
Dec-04	195.4	13.1	27.6	118.6	36.2	63.6	117.50	103.2	131.9
Jan-05	195.2	13.2	27.9	118.4	35.7	61.3	111.40	103.7	131.7
Feb-05	195.4	13.1	28.3	118.1	35.9	63.0	110.70	102.9	132.0
Mar-05	194.5	13.0	28.2	117.4	36.0	63.7	112.30	101.9	132.3
Apr-05	193.7	13.1	28.4	117.0	35.2	63.0	113.80	100.3	132.6
May-05	195.7	13.2	28.7	117.8	36.0	65.7	116.10	99.2	133.1
Jun-05	196.3	13.1	28.9	118.0	36.4	64.7	117.20	98.6	134.5
Jul-05	-	-	-	-	-	64.2	117.40	98.0	134.4
Month-over-month growth rates									
Jul-04	-0.4	-1.5	0.3	-0.9	1.4	-0.6	0.4	-0.3	0.0
Aug-04	1.2	1.5	0.4	0.9	2.6	-1.9	-0.3	-1.8	-0.1
Sep-04	-0.4	0.2	-0.2	-0.8	0.8	2.7	0.5	1.4	0.2
Oct-04	-0.5	0.8	-0.1	-0.2	-2.4	-0.3	-0.9	-0.1	0.2
Nov-04	0.7	-0.8	-0.3	0.8	1.7	0.6	0.9	1.1	0.2
Dec-04	0.8	-1.1	0.6	0.8	2.0	0.9	1.5	0.0	1.0
Jan-05	-0.1	1.3	0.9	-0.1	-1.3	-2.3	-5.2	0.5	-0.2
Feb-05	0.1	-1.2	1.8	-0.3	0.5	1.7	-0.6	-0.8	0.2
Mar-05	-0.5	-0.8	-0.6	-0.6	0.3	0.7	1.4	-1.0	0.2
Apr-05	-0.4	0.9	0.9	-0.3	-2.2	-0.7	1.3	-1.6	0.2
May-05	1.0	0.8	0.8	0.7	2.3	2.7	2.0	-1.1	0.4
Jun-05	0.3	-0.6	0.7	0.1	1.1	-1.0	0.9	-0.6	1.1
Jul-05	-	-	-	-	-	-0.5	0.2	-0.6	-0.1

¹Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

²Source: Pannell Kerr Forster and BC Stats

³Occupancy Rate change expressed as percentage point change

⁴No identifiable seasonality.

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns ¹					
	Receipts (\$ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services

Annual data

2000	5,079.6	505.6	4,574.1	32,568.0	2,487.5	30,080.5
2001	5,317.2	533.7	4,783.5	33,743.3	2,602.8	31,140.5
2002	5,403.0	546.2	4,856.8	34,527.9	2,610.2	31,917.7
2003	5,654.4	584.9	5,069.5	35,043.2	2,626.9	32,416.4
2004	5,969.2	625.0	5,344.1	36,670.1	2,707.4	33,962.7

Annual growth rates

2000	5.3	5.3	5.2	6.9	4.3	7.2
2001	4.7	5.6	4.6	3.6	4.6	3.5
2002	1.6	2.3	1.5	2.3	0.3	2.5
2003	4.7	7.1	4.4	1.5	0.6	1.6
2004	5.6	6.9	5.4	4.6	3.1	4.8

Monthly data

Jul-04	493	53	440	3,051	231	2,821
Aug-04	496	51	445	3,114	223	2,891
Sep-04	504	52	452	3,071	225	2,846
Oct-04	503	53	450	3,069	227	2,842
Nov-04	528	52	476	3,156	219	2,937
Dec-04	495	52	443	3,028	227	2,801
Jan-05	523	64	459	3,236	249	2,987
Feb-05	520	52	467	3,224	228	2,997
Mar-05	502	45	456	3,151	233	2,918
Apr-05	509	47	463	3,136	230	2,906
May-05	535	51	484	3,172	228	2,943
Jun-05	517	47	470	3,189	229	2,960
Jul-05	518	47	471	3,165	228	2,937

Month-over-month growth rates

Jul-04	-1.1	-0.7	-1.2	0.1	1.1	0.1
Aug-04	0.6	-3.1	1.1	2.1	-3.2	2.5
Sep-04	1.6	2.2	1.5	-1.4	0.7	-1.5
Oct-04	-0.1	2.6	-0.5	-0.1	0.9	-0.2
Nov-04	4.9	-2.3	5.8	2.8	-3.6	3.4
Dec-04	-6.3	-0.4	-7.0	-4.1	3.7	-4.6
Jan-05	5.7	22.9	3.6	6.9	9.9	6.7
Feb-05	-0.6	-18.1	1.9	-0.4	-8.6	0.3
Mar-05	-3.4	-13.2	-2.3	-2.3	2.2	-2.6
Apr-05	1.5	2.7	1.4	-0.5	-1.2	-0.4
May-05	5.0	8.6	4.7	1.1	-0.7	1.3
Jun-05	-3.3	-6.8	-2.9	0.5	0.1	0.6
Jul-05	0.1	-1.3	0.2	-0.8	-0.4	-0.8

¹Source: Statistics Canada & BC Stats.

Explanatory Notes

Data Sources

All room revenue data reported is compiled by BC STATS using the hotel tax database maintained and administered by the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Traveller Entry data is from Statistics Canada. All other data sources are accredited within the report.

Accommodation Categories

Each property has been assigned to one of eight accommodation categories. In addition to motels and four sizes of hotels, there are three special accommodation categories:

Fishing Lodges – All inland and coastal fishing camps located on or near lakes, rivers and oceans. Includes lodges which offer inland fishing expeditions, marinas with accommodation and lodges offering the services of fishing guides.

Vacation Rentals – Includes beach houses, cabins, and selected trailer parks. May also include certain inns and apartment complexes.

Miscellaneous – Includes guest ranches; outfitting, adventure hunting and other types of outdoor adventure; lodges that cater to skiers, hikers, etc. (with the exception of those lodges that mainly service cabins); bed and breakfasts; and houseboats. Also includes universities, mining firms, farms and other establishments renting rooms whose primary activity is not accommodation.

Seasonally Adjusted Data

Accommodation revenue exhibits large, regular seasonal fluctuations, characterised by peaks in the summer months and troughs in the winter months.

The *Tourism Sector Monitor* report uses Statistics Canada's X11/ARIMA/88 technique to remove the effects of seasonality from the revenue time series. The resulting seasonally adjusted series provides a useful tool for the analysis of underlying trends in accommodation revenue.

Unless otherwise indicated, revenue data in the *Tourism Sector Monitor* report is adjusted for seasonal fluctuations.

Tourism Sector Monitor is prepared by BC STATS, Ministry of Management Services, using data from the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Visit BC STATS on the World Wide Web at www.bcstats.gov.bc.ca

Limitations

The data reported here is derived from the hotel tax database. Tax is not payable for several kinds of accommodation, including:

1. properties with three or fewer rooms (such as small bed and breakfast operations);
2. room rentals exceeding one month in duration;
3. lodging where the daily rate is below \$20;
4. lodging supplied to passengers of a ship or train while the ship or train is in transit or is making a scheduled stopover in the Province;
5. lodging supplied by employers to employees; and,
6. lodging supplied to consular employees and their staff.

Readers wishing more information regarding the nature of the hotel tax are referred to the Hotel Room Tax Act and the Hotel Room Tax Regulations.

Room Counts

Data are obtained primarily from Tourism BC's *Accommodation Guide* and supplemented by estimates from the Consumer Taxation Branch's hotel tax file. Vendors and their rooms are not counted in any given month unless revenue has been reported.

Suppression

The protection of confidentiality requires the suppression of categories not containing at least four properties. In most cases, protection is achieved by aggregating confidential cells into larger categories.

Revisions

A standard revision cycle accommodates corrections to the source data, to the allocation of consolidated reporters, and to the coding of properties by accommodation type. Revisions are implicit in the seasonally adjusted data and in the month-over-month, year-over-year and year-to-date percentage changes of subsequent reports, and are comprehensively reported in the annual tables published in the Annual issue of the *Tourism Sector Monitor* report.

NUMBER

NUMÉRO

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Tourism Sector Monitor ♦ October 2005

Room Revenue

Room revenues continued to slump (-0.6%, *seasonally adjusted*) in July with revenues declining in four regions, including the two largest—Mainland/Southwest (-1.7%), and Vancouver Island/Coast (-0.5%), which account for about 70% of the provincial total. The northern regions of the province were also slower in July, but revenues were up in the rest of BC. Nechako (+5.1%), Cariboo (+4.5%), Kootenay (+4.2%) and Thompson-Okanagan (+1.0%) all recovered after slipping in June.

Room revenues slipped in July

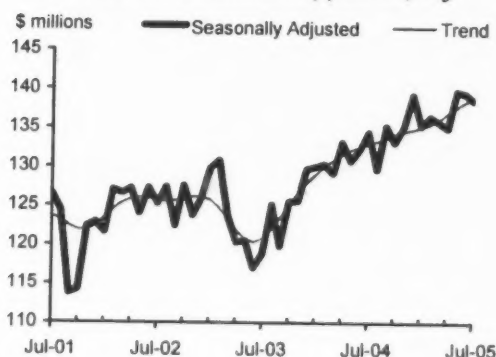


Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type			
	July 05 (\$000)	June 05 (\$000)	% change
Total	138,497	139,375	-0.6
Hotels	102,349	103,244	-0.9
Motels	17,712	17,221	+2.9
Other Accommodations	19,650	19,763	-0.6
Regions (Top 3 performers)			
Nechako	802	764	+5.1
Cariboo	4,426	4,236	+4.5
Kootenay	6,827	6,550	+4.2

Hotels, especially big hotels (-2.1%, 250+ rooms) were not as busy in July. Revenues at midsized hotels were flat, while smaller properties (1-75 rooms) posted declines. However, motel operators fared better (+0.9%). Revenues for other types of accommodations were also off in July.

Visitor Entries

Visitor entries to Canada through BC border crossings continued to decline (-0.9%, *seasonally adjusted*) in July with fewer visitors from all areas except Europe (+0.3%). Entries from the US were down 0.8% and overseas visits decreased largely because Asian entries were weak, with fewer visits from most Asian countries.

The number of Canadians re-entering the country through BC borders decreased (-2.6%) in July, after falling 3.0% in June.

Visitor entries continued to decline

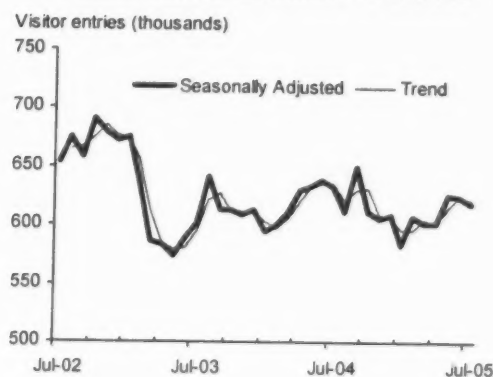


Table 2. Traveller Entries
(seasonally adjusted)

	Jul-05 (000)	Jun-05 (000)	% chg from Jun-05
American visitors			
Total	489	493	-0.8
Same-day	195	202	-3.2
Overnight	291	289	0.6
Overseas visitors			
Total	127	128	-1.2
Europe	42	42	0.3
UK	21	22	-4.2
Asia	63	64	-0.8
Japan	22	23	-5.7
Taiwan	8	8	3.2
Oceania	14	14	-0.9

(BC STATS & Statistics Canada)

Note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Other Indicators

Other tourism indicators were generally weak in July.

The occupancy rate in BC hotels was down 0.6%, but room prices increased 0.3%.

The Consumer Price Index for traveller accommodation fell (-0.7%) for the sixth consecutive month. Passenger traffic at the Vancouver airport was unchanged from June, but traffic through Victoria decreased 3.3%. Fewer passenger vehicles (-0.2%) passed the toll booth of the Coquihalla highway in July. In addition, both vehicle (-1.1%) and passenger (-1.4%) volumes aboard BC Ferries continued to fall.

The cost of restaurant food dipped (-0.1%) in July. Although there was a decline in sales at BC drinking places (-2.7%), sales at food services establishments (+0.2%) edged up and overall restaurant, caterer and tavern receipts were unchanged in July.

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Jul-05	Jun-05	Change from Jun-05
Hotel Industry			
Occupancy rate	63.8	-0.6 pp.	
Average room charge	117.70	0.3%	
(Pannell Kerr Forster)			
Airport Passengers (000s) (%)			
Vancouver International Airport			
Total traffic	1,372	0.0	
US (trans-border)	330	0.3	
Other International	342	0.8	
Canada (domestic)	700	-0.5	
(YVR)			
Victoria International Airport			
Total traffic	106	-3.3	
(Victoria Airport Authority)			
Restaurant Receipts (\$ millions) (%)			
All establishments	518	0.0	
Food service	472	0.2	
Drinking places	46	-2.7	
(Statistics Canada)			
Transportation (000s) (%)			
Coquihalla Highway			
Passenger Vehicles	223	-0.2	
(Ministry of Transportation & Highways)			
BC Ferries			
Vehicle Volume	708	-1.1	
Passenger Volume	1,792	-1.4	
(BC Ferries)			
Exchange Rates Cdn \$			
US \$	0.818	0.01	
UK Pound	0.467	0.02	
Japanese Yen	91.567	3.89	
Australian \$	1.087	0.04	
(Statistics Canada)			

Note: pp. percentage points

Note to readers: all data in the *Tourism Sector Monitor* are reported on a seasonally adjusted basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues continued to slip (-0.5%, *seasonally adjusted*) in August as seven out of eight regions lost ground.

Hotel revenues edged up 0.1% in August. Although big hotels (+1.4%, 250+ rooms) had a better month, midsized (-0.4%, 151-250 rooms) and small (-2.4%, 1-75 rooms) hotels were not as busy in August. Room revenues were unchanged at hotels with 76-150 rooms and at non-standard accommodation, including fishing lodges, bed and

breakfasts and other short term accommodations. Motels (-7.1%) saw a large drop in their receipts in August.

Visitor entries were also off (-1.8%, *seasonally adjusted*) in August as fewer visitors came from the US (-1.5%) and overseas (-2.8%).

Passenger traffic dropped at the Vancouver airport (-1.8%), but Victoria's airport (+0.5%) was busier in August. There were also more passengers (+0.8%) and vehicles (+0.4%) aboard BC Ferries.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

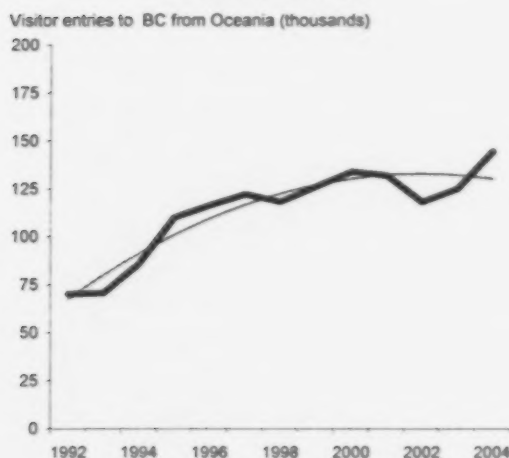
Special Focus: Oceania a small but growing market for BC

Entries from Oceania have more than doubled since 1992

BC welcomed 144,300 visitors from Oceania (Australia, New Zealand and other parts of the South Pacific) in 2004. This was 15.6% more than in 2003, and represented the second year of solid gains in entries from this region.

Oceania is not a major tourism market for BC—only 10% of entries from overseas are from countries in this region, but it is becoming more important. Between 1992 and 2004, the number of visitors entering BC from Oceania has more than doubled, and the region's share of overseas entries has risen from about nine percent in the early 1990s to more than ten percent in the last two years.

Entries from Oceania have doubled since 1992



Data Source: Statistics Canada

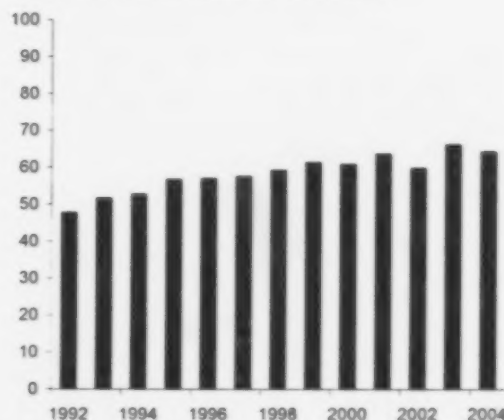
The growth in visitor entries from Oceania (+105% since 1992) is quite phenomenal, outpacing even the rapid increase in entries from Asia (+91%) that has occurred since the early 1990s. Total overseas entries expanded 81% during this period, and entries to BC from Europe were up 53%. Last year,

entries from the US, the biggest source of visitors to BC, were only 33% higher than in 1992. This suggests that a growing number of visitors from the South Pacific view Canada, including the western regions of the country, as a desirable tourist destination. There is some evidence to support the view that interest in travel to Canada is growing—in 2004, residents of New Zealand identified Canada as the 13th most popular travel destination, ahead of other favoured nations such as France, Italy and Germany.

One factor contributing to the solid growth in entries from the South Pacific may be that Vancouver is Canada's west coast point of entry, and many travellers from Oceania enter the country through the Port of Vancouver. The Vancouver airport is a hub for travel from the far east, and this may explain some of the growth since a large share of Canadian entries from Oceania (60%) are recorded in BC. The province's share of total entries from Oceania has been climbing—the percentage grew from 48% in 1992 to 64% in 2004.

More Oceania travellers enter Canada via BC

Entries to BC from Oceania as a % of Canadian total



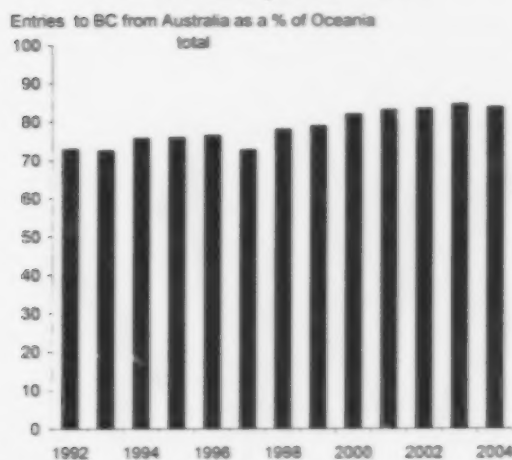
Data Source: Statistics Canada

Six in ten visitors from Oceania used BC as their point of entry to Canada in 2004. There were 144,300 entries from Oceania in 2004, which was up 15.6% compared to 2003. People from Oceania continued to show their interest in BC in 2005, a total of 112,500 people took trips to Canada via BC in the first eight months of 2005, up 11.3% compared to the same period of 2004.

In 2004, Canada welcomed 225,200 people from Oceania, up 19.2% from the previous year. This showed a strong recovery from a downward trend experienced since 2001. The downturn was exacerbated by the events of 9/11 and the subsequent safety, security and health concerns. A recent economic recovery has improved consumer confidence in Oceania markets, resulting in increased demand for travel and tourism to Canada. Visits to Canada from Oceania reached a historic high of 33,984 in June 2005.

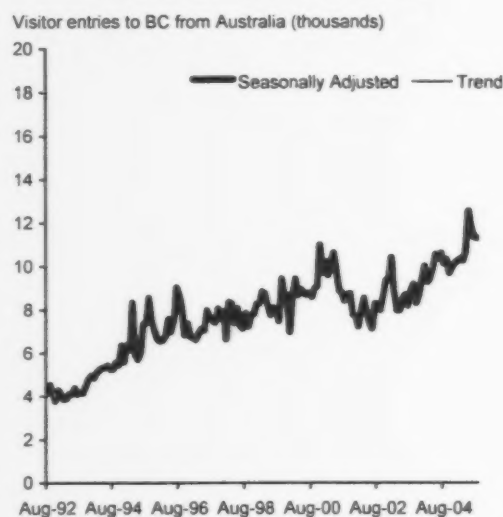
More Australians came to BC in 2004

Australia is the biggest source of visitor entries from Oceania



Data Source: Statistics Canada

Entries to BC from Australia more than doubled since 1992



Data Source: Statistics Canada

Australians are the biggest source of visitors—more than 80% of entries from Oceania to BC are from Australia. More than 120,600 Australian visitors entered directly via BC, 14.6% more than in the previous year. In May 2005, BC welcomed 19,600 (seasonally adjusted) travellers from Australia, the highest monthly total on record. The province's share of total entries from Australia has been climbing—the percentage grew from 74% in 1992 to 82% in 2004.

Despite many economic stumbling blocks around the world in the last decade, Australia has maintained fairly steady economic growth. This economic stability has been beneficial to Canada as overnight trips from Australia have increased on average by 5.5% in the last ten years (Canadian Tourism Commission, 2004).

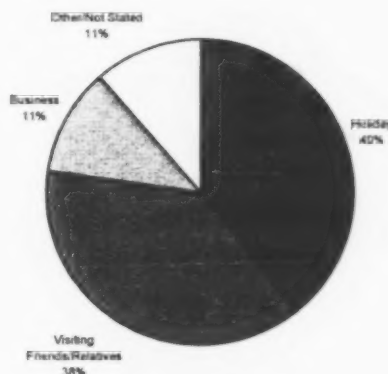
On the heels of an economic rebound accompanied by a favourable exchange rate, Australian travel to Canada grew to 185,100 in 2004.

Significant growth in the number of visitors from New Zealand to BC in 2004

Among all of the provinces, BC is the most attractive region for people from New Zealand—approximately six in ten visitors from New Zealand entered Canada via BC. There were 22,200 entries in 2004, up 21.1% compared to the previous year. In addition, visits from New Zealand were up 14.5% during the first eight months of 2005, relative to the same period of 2004. However, New Zealand represents a smaller share of total Oceania entries to BC, which went down from 24% in 1992 to 15% in 2004.

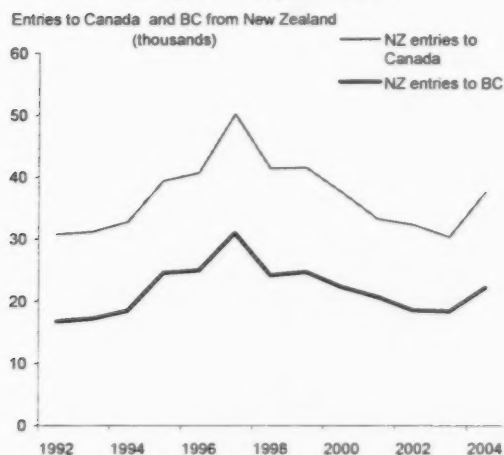
New Zealand, as the second most important Oceania market for Canada, experienced double-digit growth (23.9%) in 2004—more than 37,500 New Zealand travellers visited Canada.

Characteristics of New Zealand Resident Travellers to Canada



Data Source: Statistics New Zealand

Travel from New Zealand to BC picked up in 2004



Data Source: Statistics Canada

According to Statistics New Zealand, in 2004, pleasure trips to Canada rose about 10%, of which 39% of visits to Canada were for vacation and holiday purposes, while 38% of New Zealand travellers came to Canada to visit relatives or friends.

Table 1: Room Revenue by Development Region (\$000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,244	863,420	229,533	76,892	46,181	20,127	8,811	51,889	1,592,097

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	3.9	-1.3	12.2	7.1

Monthly data

Jul-04	24,732	73,350	19,435	6,417	3,775	1,748	754	4,161	134,372
Aug-04	24,512	70,244	18,376	6,173	3,836	1,713	726	4,078	129,659
Sep-04	25,167	73,696	19,297	6,458	3,821	1,654	775	4,308	135,176
Oct-04	24,725	71,452	19,090	6,269	3,912	1,705	739	5,247	133,139
Nov-04	25,207	71,721	19,941	6,510	3,952	1,745	765	5,219	135,059
Dec-04	26,266	74,488	20,265	6,280	4,742	1,534	789	4,828	139,193
Jan-05	25,988	71,318	20,337	6,261	3,876	1,630	841	5,014	135,265
Feb-05	25,482	70,821	20,940	6,189	4,229	1,703	1,011	6,072	136,447
Mar-05	26,630	70,041	21,171	6,143	4,180	1,744	1,005	4,778	135,693
Apr-05	25,949	70,628	20,934	6,375	4,739	1,679	913	3,777	134,995
May-05	26,031	73,549	21,127	6,589	4,370	2,018	912	5,104	139,701
Jun-05	25,750	74,638	20,415	6,550	4,236	1,785	764	5,238	139,375
Jul-05	25,623	73,382	20,625	6,627	4,426	1,769	802	5,043	138,497

Month-over-month growth rates

Jul-04	1.4	1.9	1.5	1.4	-0.6	3.3	0.7	3.1	1.7
Aug-04	-0.9	-4.2	-5.4	-3.8	1.6	-2.0	-3.6	-2.0	-3.5
Sep-04	2.7	4.9	5.0	4.6	-0.4	-3.5	6.7	5.7	4.3
Oct-04	-1.8	-3.0	-1.1	-2.9	2.4	3.1	-4.6	21.8	-1.5
Nov-04	2.0	0.4	4.5	3.8	1.0	2.4	3.4	-0.5	1.4
Dec-04	4.2	3.9	1.6	-3.5	20.0	-12.1	3.2	-7.5	3.1
Jan-05	-1.1	-4.3	0.4	-0.3	-18.3	6.2	6.5	3.8	-2.8
Feb-05	-1.9	-0.7	3.0	-1.2	9.1	4.5	20.3	21.1	0.9
Mar-05	4.5	-1.1	1.1	-0.7	-1.2	2.4	-0.6	-21.3	-0.6
Apr-05	-2.6	0.8	-1.1	3.8	13.4	-3.7	-9.1	-20.9	-0.5
May-05	0.3	4.1	0.9	3.4	-7.8	20.2	-0.1	35.1	3.5
Jun-05	-1.1	1.5	-3.4	-0.6	-3.1	-11.6	-16.3	2.6	-0.2
Jul-05	-0.5	-1.7	1.0	4.2	4.5	-0.9	5.1	-3.7	-0.6

July month-over-month percent growth

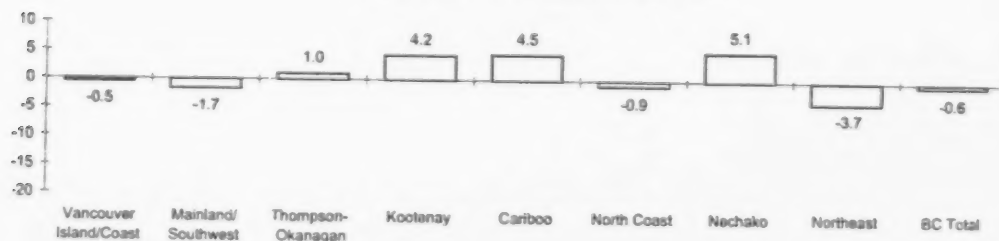


Table 2: Room Revenue by Accommodation Type (\$000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous Incl. Fishing Lodges
	251+	151-250	76-150	1-75			

Annual data

2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423
2004	487,820	198,608	321,679	185,692	195,041	124,433	98,824

Annual growth rates

2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
2004	6.8	9.8	8.2	6.6	7.5	4.1	3.6

Monthly data

Jul-04	39,291	16,576	27,106	15,766	16,608	10,404	8,458
Aug-04	38,120	16,322	26,149	15,347	15,407	10,367	8,224
Sep-04	40,347	17,060	27,082	15,901	16,341	10,648	8,796
Oct-04	37,425	16,638	27,037	16,033	16,442	11,322	8,314
Nov-04	37,629	17,763	27,952	15,750	17,681	11,113	8,497
Dec-04	42,822	17,369	27,314	15,601	17,245	11,230	8,455
Jan-05	38,889	16,590	27,184	15,079	16,599	11,237	8,100
Feb-05	38,481	16,999	27,690	15,887	17,384	10,748	8,280
Mar-05	38,596	17,030	27,929	16,700	17,821	10,239	8,211
Apr-05	35,960	17,681	27,759	16,551	18,064	8,293	7,653
May-05	39,641	17,745	28,695	17,450	18,138	10,385	9,431
Jun-05	39,783	17,451	28,775	17,235	17,221	11,161	8,603
Jul-05	38,951	17,458	28,834	17,106	17,712	11,094	8,555

Month-over-month growth rates

Jul-04	-1.5	-1.0	1.0	2.1	3.1	5.0	6.0
Aug-04	-3.0	-1.5	-3.5	-2.7	-7.2	-0.4	-2.8
Sep-04	5.8	4.5	3.6	3.6	6.1	2.7	7.0
Oct-04	-7.2	-2.5	-0.2	0.8	0.6	6.3	-5.5
Nov-04	0.5	6.8	3.4	-1.8	7.5	-1.9	2.2
Dec-04	13.8	-2.2	-2.3	-0.9	-2.5	1.1	-0.5
Jan-05	-9.2	-4.5	-0.5	-3.3	-3.7	0.1	-4.2
Feb-05	-1.0	2.5	1.9	5.4	4.7	-4.3	2.2
Mar-05	0.3	0.2	0.9	5.1	2.5	-4.7	-0.8
Apr-05	-6.8	3.8	-0.6	-0.9	1.4	-19.0	-6.8
May-05	10.2	0.4	3.4	5.4	0.4	25.2	23.2
Jun-05	0.4	-1.7	0.3	-1.2	-5.1	7.5	-8.8
Jul-05	-2.1	0.0	0.2	-0.7	2.9	-0.6	-0.5

July month-over-month percent growth

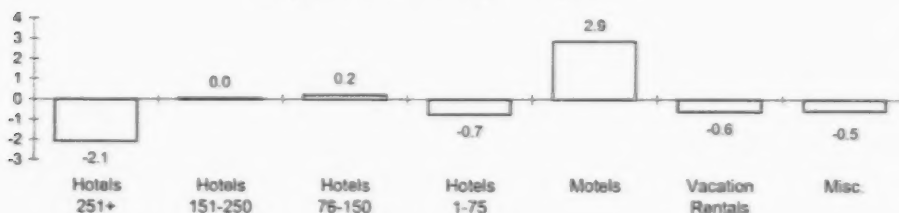


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Jul-05	YTD 05	Jul-04	YTD 04	Jul-05	Jul-04	Jul-05	Jul-04
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	24,596	99,231	1.2	6.6	191	3	8,566	117
Total - Hotels	19,515	81,884	1.4	6.7	72	1	5,741	54
76+ Rooms	14,656	62,590	2.6	5.7	26	0	3,937	0
1-75 Rooms	4,859	19,294	-1.9	10.3	46	1	1,804	54
Motels	2,331	8,579	2.0	8.4	28	-1	1,116	29
Vacation Rentals	985	2,933	4.0	4.3	30	3	357	14
19 Cowichan Valley								
Total - All accommodation types	1,307	5,224	12.0	10.4	38	1	674	14
Motels	333	1,326	37.8	21.3	17	1	331	15
21 Nanaimo								
Total - All accommodation types	5,806	22,932	-0.8	7.4	71	-6	2,486	-183
Total - Hotels	2,332	11,476	-10.6	4.8	18	-3	1,126	-160
Motels	1,247	4,641	3.7	8.2	23	0	621	-4
Vacation Rentals	1,912	5,647	8.1	11.4	20	-2	586	-15
23 Alberni-Clayoquot								
Total - All accommodation types	7,189	22,476	12.5	11.5	65	-2	1,475	-14
Total - Hotels	1,606	5,354	9.3	1.3	12	0	432	22
Motels	719	2,204	1.8	9.2	20	0	408	3
Vacation Rentals	2,906	8,836	26.7	25.4	14	-1	335	3
25 Comox-Strathcona								
Total - All accommodation types	4,824	17,192	2.8	0.2	88	-1	2,118	24
Fishing lodges	1,250	2,664	-1.7	-1.1	23	-2	399	-12
Motels	956	4,194	0.2	-1.5	22	-1	603	-23
Vacation Rentals	789	2,025	9.7	-4.8	24	1	302	14
27 Powell River								
Total - All accommodation types	488	2,139	-18.9	-23.4	19	0	386	-9
43 Mount Waddington								
Total - All accommodation types	992	2,899	4.1	3.1	26	-1	667	-45
45 Central Coast								
Total - All accommodation types	339	980	16.4	0.0	11	-1	155	-5
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	5,121	22,409	18.0	5.6	69	5	2,454	42
Total - Hotels	3,498	16,216	20.2	6.5	18	-1	1,349	-5
Motels	1,219	4,735	10.0	11.2	37	1	930	13
15 Greater Vancouver								
Total - All accommodation types	80,799	380,342	-0.0	3.8	246	0	27,072	-306
Total - Hotels	74,553	354,861	-0.1	2.7	160	1	22,925	-411
251+ Rooms	37,196	188,091	-8.0	-1.8	23	-2	9,252	-704
151-250 Rooms	15,283	69,082	8.3	6.3	26	1	4,952	200
76-150 Rooms	15,889	72,225	7.6	8.4	54	-1	5,884	-104
1-75 Rooms	6,185	25,463	16.3	13.3	57	3	2,837	197
Motels	2,619	10,630	3.7	10.0	36	-1	1,597	-20
Vacation Rentals	923	7,654	-18.2	59.8	20	1	716	129
29 Sunshine Coast								
Total - All accommodation types	789	2,594	10.6	12.5	22	-2	391	-15
31 Squamish-Lillooet								
Total - All accommodation types	11,494	113,689	-6.1	-10.5	99	-3	7,280	-448
Total - Hotels	9,718	92,259	-4.9	-9.8	45	-2	5,480	-495
1-75 Rooms	705	6,566	-14.5	-23.5	18	-2	665	-90
Vacation Rentals	1,055	15,377	-9.4	-11.6	28	0	1,239	11
Miscellaneous	488	5,067	-16.1	-19.6	17	-1	344	36
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	9,458	23,426	7.7	7.6	117	-3	3,216	-63
Total - Hotels	3,998	11,457	8.9	3.4	15	-1	1,074	-9
Motels	4,443	9,190	7.9	8.4	76	-4	1,759	-95

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Jul-05	YTD 05	Jul-04	YTD 04	Jul-05	Jul-04	Jul-05	Jul-04
33 Thompson-Nicola								
Total - All accommodation types	8,754	39,938	0.6	3.0	172	-5	5,685	-80
Total - Hotels	4,095	18,129	2.2	2.8	35	-2	2,226	-46
76+ Rooms	3,156	14,551	3.4	3.0	12	0	1,388	-1
1-75 Rooms	939	3,578	-1.6	1.8	23	-2	838	-45
Motels	3,214	11,554	-1.2	2.6	77	0	2,299	-2
Vacation Rentals	423	6,597	2.9	1.4	23	-3	592	-19
35 Central Okanagan								
Total - All accommodation types	11,092	44,266	5.3	11.5	66	-4	3,367	-329
Total - Hotels	6,943	29,106	11.9	12.0	19	1	1,710	4
Motels	2,731	7,554	1.4	0.1	26	-3	1,096	-63
Vacation Rentals	941	6,314	-3.0	28.6	17	-2	385	-45
37 North Okanagan								
Total - All accommodation types	2,660	13,766	4.4	16.2	49	-3	1,604	-78
Motels	1,088	4,065	7.9	18.0	19	-1	588	-66
39 Columbia-Shuswap								
Total - All accommodation types	7,474	24,089	6.1	11.3	114	2	3,421	71
Total - Hotels	3,227	9,917	7.6	7.0	21	2	1,254	30
Motels	2,788	8,139	10.2	7.8	47	-3	1,524	-46
Kootenay								
01 East Kootenay								
Total - All accommodation types	6,570	32,132	6.0	-3.3	113	1	4,447	-14
Total - Hotels	1,888	10,976	3.7	5.8	24	-2	1,399	-70
Motels	1,856	6,425	11.6	4.6	50	1	1,195	32
Vacation Rentals	1,161	6,914	15.2	-14.8	15	-1	948	14
03 Central Kootenay								
Total - All accommodation types	2,841	10,951	5.1	5.7	81	-3	1,595	-42
Total - Hotels	1,525	6,029	11.6	7.1	18	0	754	-15
Motels	709	2,677	-3.0	7.6	28	-2	517	-16
Vacation Rentals	318	882	3.0	15.4	20	-1	157	-7
05 Kootenay Boundary								
Total - All accommodation types	1,020	3,817	36.4	7.3	37	2	708	42
Motels	573	1,906	16.2	4.5	23	1	422	52
Cariboo								
41 Cariboo								
Total - All accommodation types	2,792	10,401	13.6	10.9	110	-10	2,179	-82
Fishing lodges	153	382	0.9	0.4	17	0	154	2
Motels	1,340	5,630	19.8	15.3	37	-1	1,036	-26
Vacation Rentals	255	531	-10.8	-6.5	31	-6	314	-40
53 Fraser-Fort George								
Total - All accommodation types	3,623	18,904	19.8	19.6	59	2	2,762	78
Total - Hotels	2,444	13,571	24.3	21.4	19	1	1,474	82
Motels	1,039	4,656	14.1	18.2	28	0	959	-8
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	2,434	7,188	0.5	3.1	43	0	1,182	11
Motels	389	1,333	-0.8	-2.3	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	1,034	5,005	1.8	7.0	36	-1	847	10
Motels	349	1,838	-9.1	8.7	16	0	393	14
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	1,089	5,549	3.6	20.3	56	-2	1,144	-80
Motels	577	3,006	2.1	15.1	23	-2	612	-57
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	4,709	38,083	20.9	24.9	68	-3	2,907	-550
Total - Hotels	2,556	17,198	25.7	18.7	23	2	1,579	75
Motels	1,361	8,327	18.4	22.4	33	-1	903	-29

.. Data for regions with fewer than 10 properties reporting can not be released.

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Jul-05	YTD 05	Jul-04	YTD 04	Jul-05	Jul-04	Jul-05	Jul-04
Vancouver Island/Coast	45,540	173,072	2.9	6.2	509	-7	16,527	-101
Victoria (C)	18,899	79,814	1.1	7.1	93	6	5,972	244
Other CRD	4,574	14,683	-1.5	-1.8	88	-2	2,260	-129
Nanaimo (C)	2,344	12,541	-1.7	11.9	23	0	1,221	-5
Port Alberni (C)	496	2,167	-7.8	7.2	14	-1	393	13
Courtenay (C)	961	5,068	-0.8	4.8	12	2	467	45
Rest of Development Region	18,267	58,800	7.3	5.9	291	-10	6,214	-269
Mainland/Southwest	98,203	519,033	0.1	0.4	436	0	37,197	-727
Downtown Vancouver (C)	50,120	237,057	-4.0	0.3	87	3	12,844	-87
Other Vancouver (C)	4,910	23,914	14.2	33.2	37	0	2,904	224
Richmond (C)	12,851	60,850	9.7	8.5	25	0	4,317	-20
Burnaby (C)	3,028	14,699	-2.9	-5.2	11	-1	1,357	99
Other GVRD	9,889	43,821	4.8	7.7	86	-2	5,650	-145
Whistler (DM)	10,641	109,233	-6.5	-11.2	72	-4	6,567	-547
Rest of Development Region	6,763	29,458	14.3	7.0	118	4	3,558	-251
Thompson/Okanagan	39,438	145,486	4.9	8.8	518	-13	17,293	-479
Penticton (C)	5,165	13,390	7.8	3.8	48	-5	1,752	-68
Kamloops (C)	5,935	30,301	-3.3	0.3	71	-4	3,726	-27
Kelowna (C)	9,434	40,408	6.5	13.2	46	-5	2,668	-309
Vernon (C)	2,219	12,956	3.3	16.7	30	-1	1,393	-63
Revelstoke (C)	2,330	8,968	-3.7	4.2	33	2	1,309	51
Rest of Development Region	14,355	39,465	8.3	12.1	290	0	6,445	-63
Kootenay	10,432	46,900	8.1	-0.5	231	0	6,750	-14
Cranbrook (C)	1,158	4,807	5.0	8.6	17	0	794	7
Nelson (C)	968	3,663	6.3	-2.2	12	-1	425	-4
Rest of Development Region	8,306	38,429	8.8	-1.4	214	0	5,956	-21
Cariboo	6,416	20,305	17.1	16.4	169	-8	4,941	-4
Quesnel (C)	520	2,247	14.7	10.0	12	-1	443	-9
Williams Lake (C)	713	3,039	21.4	16.8	12	0	574	0
Prince George (C)	2,390	14,240	21.6	20.8	32	2	2,004	78
Rest of Development Region	2,793	9,779	12.9	11.8	113	-9	1,920	-73
North Coast	3,468	12,193	1.0	4.7	79	0	2,029	29
Prince Rupert (C)	1,025	4,010	-0.8	0.7	17	1	784	11
Terrace (C)	547	2,942	2.1	9.5	13	-1	426	-7
Rest of Development Region	1,895	5,240	1.6	5.3	49	0	819	25
Nechako	1,089	5,549	3.6	20.3	56	-2	1,144	-80
Smithers (T)	517	2,842	9.4	32.7	15	0	449	0
Rest of Development Region	572	2,707	-1.2	9.5	41	-2	695	246
Northeast	4,709	38,083	20.9	24.9	68	-3	2,907	-550
Dawson Creek (C)	795	4,957	17.2	32.8	13	0	471	-13
Fort St. John (C)	2,023	17,021	24.2	11.9	18	-3	1,018	-96
Rest of Development Region	1,891	16,104	19.0	39.3	37	0	1,418	-441

.. Data for regions with fewer than 10 properties reporting can not be released.

Table 5: Historical Unadjusted Room Revenue by Development Region (\$000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson/ Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,244	863,420	229,533	76,892	46,181	20,127	8,811	51,889	1,592,097

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	3.9	-1.3	12.2	7.1

Monthly data

Jul-04	44,238	98,089	37,609	9,647	5,481	3,434	1,051	3,896	203,445
Aug-04	49,430	101,817	37,115	10,120	6,109	3,253	1,100	4,029	212,973
Sep-04	35,179	81,870	23,602	7,603	5,234	2,334	1,172	4,075	161,067
Oct-04	20,981	55,010	13,961	4,252	3,996	1,251	886	5,132	105,468
Nov-04	13,405	43,212	8,484	2,886	2,856	959	570	4,183	76,555
Dec-04	13,224	64,448	12,659	4,875	2,804	685	469	3,971	103,134
Jan-05	11,280	61,240	13,166	5,699	2,447	729	486	5,918	100,965
Feb-05	14,443	68,394	16,512	7,347	2,830	1,027	666	9,234	120,452
Mar-05	19,694	72,544	19,344	7,273	3,540	1,143	841	7,407	131,786
Apr-05	21,271	60,174	13,445	4,820	4,213	1,013	642	3,458	109,037
May-05	27,664	73,343	19,759	5,288	4,614	1,894	826	3,206	136,594
Jun-05	33,180	85,136	23,822	6,041	5,245	2,920	999	4,150	161,492
Jul-05	45,540	98,203	39,438	10,432	6,416	3,468	1,089	4,709	209,294

Year-over-year percent changes

Jul-04	12.4	13.9	14.4	11.6	6.0	10.7	-0.7	3.6	13.0
Aug-04	5.2	0.6	0.2	1.5	9.7	4.7	-3.6	1.3	1.9
Sep-04	11.8	12.8	17.9	14.1	9.6	-0.2	7.4	15.2	13.1
Oct-04	5.4	5.2	1.2	0.2	5.9	3.7	-8.0	48.5	5.9
Nov-04	5.1	4.3	5.5	16.2	8.9	6.2	5.9	41.0	6.7
Dec-04	12.4	8.6	8.6	-3.0	27.5	-17.5	3.4	4.4	8.5
Jan-05	3.6	2.9	5.1	-3.0	7.5	-7.8	17.1	33.7	4.4
Feb-05	2.3	-0.1	9.5	-10.2	15.5	-0.6	45.0	46.0	3.7
Mar-05	13.9	-2.4	22.5	-6.4	9.8	9.9	65.8	12.8	4.1
Apr-05	9.1	-5.2	5.9	-3.7	30.7	-4.1	17.8	-5.5	-0.1
May-05	8.0	2.5	9.5	11.1	20.4	25.9	26.6	33.7	6.4
Jun-05	5.7	4.3	8.5	2.1	11.6	4.8	1.6	28.4	5.9
Jul-05	2.9	0.1	4.9	8.1	17.1	1.0	3.6	20.9	2.9

July year-over-year percent change

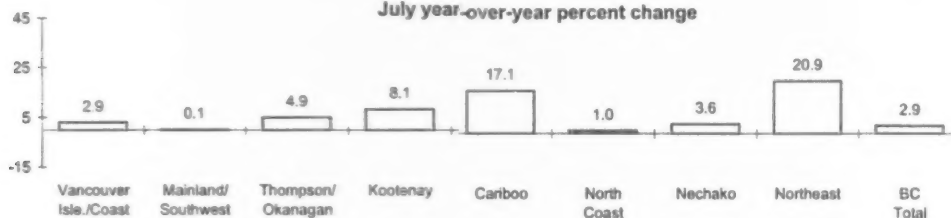


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA				Overseas		
		Total*	Total	Same-day	Overnight	Total	Asia	Europe

Annual data

2000	8,481.7	7,006.0	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,970.8	6,595.9	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.8	118.0
2003	7,335.3	6,137.4	6,137.4	2,580.7	3,556.7	1,197.8	577.6	410.1	124.8
2004	7,427.8	6,022.5	6,066.8	2,477.6	3,561.5	1,405.3	715.8	458.1	144.3

Annual percent changes

2000	2.6	2.1	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.1	-4.3	-4.3	-13.8	4.2	-3.0	4.4	-11.7	-10.5
2003	-8.0	-7.0	-7.0	-8.1	-6.1	-12.9	-24.4	-0.4	5.8
2004	1.3	-1.9	-1.2	-4.0	0.1	17.3	23.9	11.7	15.6

Monthly data

Aug-04	611.3	494.0	498.9	199.9	295.9	117.3	60.3	38.7	12.7
Sep-04	649.6	529.7	523.2	202.0	311.4	119.8	58.0	40.4	12.6
Oct-04	611.8	493.2	494.0	205.3	291.9	118.6	58.3	39.7	11.7
Nov-04	605.9	493.3	493.9	203.0	295.8	112.6	56.2	36.2	12.1
Dec-04	609.0	492.9	491.3	200.6	291.3	116.1	55.7	39.4	12.2
Jan-05	583.0	467.0	471.6	180.5	288.4	116.1	54.9	40.6	12.3
Feb-05	607.8	485.7	486.3	199.0	289.9	122.1	61.4	40.6	12.5
Mar-05	601.0	477.5	476.1	195.3	282.8	123.5	63.2	42.1	12.2
Apr-05	602.2	475.2	476.3	192.3	284.5	127.0	64.8	42.1	11.9
May-05	626.0	496.1	493.4	200.4	295.6	130.0	63.7	42.7	15.4
Jun-05	623.9	494.3	492.6	201.7	289.3	129.6	64.0	42.1	14.1
Jul-05	618.9	490.5	488.7	195.2	291.0	128.3	63.4	42.2	14.0
Aug-05	604.3	481.2	482.2	191.5	286.4	123.0	59.3	42.3	13.4

Month-over-month growth rates

Aug-04	-3.4	-3.2	-1.5	-3.1	-0.9	-4.3	0.6	-6.6	1.5
Sep-04	6.3	7.2	4.9	1.0	5.2	2.2	-4.0	4.5	-0.8
Oct-04	-5.8	-6.9	-5.6	1.6	-6.3	-1.1	0.5	-1.7	-7.4
Nov-04	-1.0	0.0	0.0	-1.1	1.3	-5.1	-3.6	-9.0	3.7
Dec-04	0.5	-0.1	-0.5	-1.2	-1.5	3.1	-0.8	8.9	1.0
Jan-05	-4.3	-5.3	-4.0	-10.0	-1.0	0.0	-1.5	3.0	0.8
Feb-05	4.2	4.0	3.1	10.3	0.5	5.2	11.8	0.1	1.7
Mar-05	-1.1	-1.7	-2.1	-1.9	-2.5	1.2	2.9	3.7	-2.4
Apr-05	0.2	-0.5	0.0	-1.5	0.6	2.8	2.6	-0.2	-2.6
May-05	4.0	4.4	3.6	4.2	3.9	2.3	-1.8	1.6	29.6
Jun-05	-0.3	-0.4	-0.2	0.6	-2.1	-0.3	0.5	-1.5	-8.7
Jul-05	-0.8	-0.8	-0.8	-3.2	0.6	-1.0	-0.8	0.3	-0.9
Aug-05	-2.4	-1.9	-1.3	-1.9	-1.6	-4.1	-6.5	0.1	-4.2

* Seasonally adjusted totals for US and overseas entries are calculated by Statistics Canada, and are adjusted to sum to national totals. Therefore, same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)					Other Transportation (000s)		
	Vancouver				Victoria	BC Ferries		Coquihalla Hwy Passenger Vehicles
	Total	Domestic	Trans- border	Other Int'l.		Vehicles	Passengers	

Annual data

2000	16,033	8,306	4,074	3,652	1,139	7,887	21,280	2,400
2001	15,477	7,869	4,001	3,608	1,158	8,104	21,309	2,461
2002	14,877	7,422	3,855	3,600	1,102	8,272	21,540	2,530
2003	14,321	7,267	3,814	3,240	1,183	8,263	21,348	2,480
2004	15,726	7,986	3,965	3,776	1,250	8,532	21,953	2,586

Annual growth rates

2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.7	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.8	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0
2004	9.8	9.9	3.9	16.5	5.7	3.3	2.8	4.3

Monthly data

Aug-04	1,313	663	333	317	101	699	1,796	210
Sep-04	1,350	687	341	323	110	712	1,832	223
Oct-04	1,331	677	337	317	104	717	1,849	215
Nov-04	1,342	683	342	318	105	726	1,863	221
Dec-04	1,351	695	338	319	107	749	1,908	216
Jan-05	1,376	716	344	317	108	681	1,720	206
Feb-05	1,361	704	331	326	111	726	1,855	228
Mar-05	1,376	701	348	328	113	723	1,841	224
Apr-05	1,362	682	340	340	110	719	1,835	221
May-05	1,391	693	349	349	109	724	1,858	228
Jun-05	1,372	704	329	340	110	716	1,817	223
Jul-05	1,372	700	330	342	106	708	1,792	223
Aug-05	1,348	695	325	328	107	711	1,807	220

Month-over-month growth rates

Aug-04	0.0	-1.1	3.1	-0.6	-3.6	-1.9	-1.9	-4.4
Sep-04	2.8	3.6	2.3	1.8	8.5	1.9	2.0	6.3
Oct-04	-1.4	-1.4	-1.1	-1.8	-5.3	0.7	0.9	-3.4
Nov-04	0.8	0.8	1.5	0.2	1.0	1.3	0.8	2.8
Dec-04	0.7	1.7	-1.1	0.3	2.3	3.2	2.4	-2.2
Jan-05	1.9	3.1	1.7	-0.6	0.9	-9.1	-9.9	-5.0
Feb-05	-1.1	-1.6	-3.6	2.8	1.9	6.5	7.9	10.7
Mar-05	1.1	-0.5	4.9	0.8	1.8	-0.4	-0.8	-1.5
Apr-05	-1.0	-2.7	-2.1	3.7	-2.5	-0.5	-0.3	-1.4
May-05	2.1	1.7	2.5	2.6	-0.7	0.7	1.3	3.1
Jun-05	-1.4	1.5	-5.8	-2.7	1.0	-1.1	-2.2	-2.1
Jul-05	0.0	-0.5	0.3	0.8	-3.3	-1.1	-1.4	-0.2
Aug-05	-1.8	-0.7	-1.5	-4.3	0.5	0.4	0.8	-1.2

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel Industry ²		Consumer Price Index ¹	
	Total tourism related	Air transport ⁴	Accommodation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%) ³	Room Rate (\$)	Travelle accommodation	Restaurant food ⁴

Annual data

2000	188.4	14.8	28.2	116.7	28.8	60.0	114.04	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.12	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	116.99	124.2	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	113.70	111.8	127.6
2004	193.2	13.0	27.6	117.8	34.8	61.5	115.63	102.5	129.9

Annual Growth Rates

2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.7	0.8	-6.9	3.3
2003	1.1	4.4	-0.7	-0.3	6.8	-1.0	-2.8	-9.9	1.8
2004	0.2	2.2	-4.7	0.0	4.3	5.5	1.7	-8.4	1.8

Monthly data

Aug-04	193.7	13.1	27.6	117.6	35.3	60.6	115.10	102.0	129.7
Sep-04	193.5	13.2	27.6	117.0	35.6	62.3	115.60	102.3	130.0
Oct-04	191.4	13.3	27.5	115.7	34.8	62.0	114.70	102.2	130.3
Nov-04	193.7	13.2	27.4	117.5	35.5	62.8	115.70	103.2	130.6
Dec-04	195.0	13.1	27.6	118.1	36.2	63.4	117.50	103.2	131.9
Jan-05	194.7	13.2	27.8	117.9	35.7	61.4	111.60	103.6	131.7
Feb-05	194.5	13.1	28.3	117.2	35.8	62.9	110.90	102.8	132.0
Mar-05	194.8	13.0	28.2	117.7	35.9	63.5	112.50	101.7	132.3
Apr-05	193.0	13.1	28.4	116.4	35.0	62.7	114.00	100.0	132.6
May-05	195.1	13.2	28.6	117.2	36.1	65.6	116.30	98.9	133.1
Jun-05	196.6	13.2	28.4	118.4	36.5	64.4	117.40	98.2	134.5
Jul-05	197.3	13.2	28.8	118.3	36.9	63.8	117.70	97.5	134.4
Aug-05	197.1	13.4	28.5	117.8	37.4	63.0	118.40	95.6	134.5

Month-over-month growth rates

Aug-04	1.0	1.0	0.4	0.8	2.4	-0.7	-0.5	-0.2	0.0
Sep-04	-0.1	0.3	0.1	-0.5	0.8	1.7	0.4	0.3	0.2
Oct-04	-1.1	0.8	-0.4	-1.1	-2.2	-0.3	-0.8	-0.1	0.2
Nov-04	1.2	-0.8	-0.3	1.5	2.0	0.8	0.9	1.0	0.2
Dec-04	0.7	-1.1	0.7	0.5	1.8	0.6	1.6	0.0	1.0
Jan-05	-0.1	1.3	0.8	-0.2	-1.2	-2.0	-5.0	0.4	-0.2
Feb-05	-0.1	-1.2	1.8	-0.6	0.3	1.5	-0.6	-0.8	0.2
Mar-05	0.2	-0.7	-0.6	0.5	0.3	0.6	1.4	-1.1	0.2
Apr-05	-1.0	0.9	0.9	-1.1	-2.6	-0.8	1.3	-1.7	0.2
May-05	1.1	0.9	0.5	0.7	3.2	2.9	2.0	-1.1	0.4
Jun-05	0.8	-0.2	-0.5	1.1	1.1	-1.2	0.9	-0.7	1.1
Jul-05	0.3	0.5	1.3	-0.1	1.1	-0.6	0.3	-0.7	-0.1
Aug-05	-0.1	1.2	-1.0	-0.4	1.3	-0.8	0.6	-1.9	0.1

¹Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

²Source: Pannell Kerr Forster and BC Stats

³Occupancy Rate change expressed as percentage point change

⁴No identifiable seasonality.

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns ¹					
	Receipts (\$ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services

Annual data

2000	5,079.6	505.6	4,574.1	32,568.0	2,487.5	30,080.5
2001	5,317.2	533.7	4,783.5	33,743.3	2,602.6	31,140.5
2002	5,403.0	546.2	4,856.8	34,527.9	2,610.2	31,917.7
2003	5,654.4	584.9	5,069.5	35,043.2	2,626.9	32,416.4
2004	5,969.2	625.0	5,344.1	36,670.1	2,707.4	33,962.7

Annual growth rates

2000	5.3	5.3	5.2	6.9	4.3	7.2
2001	4.7	5.6	4.6	3.6	4.6	3.5
2002	1.6	2.3	1.5	2.3	0.3	2.5
2003	4.7	7.1	4.4	1.5	0.6	1.6
2004	5.6	6.9	5.4	4.6	3.1	4.8

Monthly data

Aug-04	497	52	445	3,111	224	2,886
Sep-04	504	52	452	3,073	225	2,848
Oct-04	504	53	450	3,070	227	2,843
Nov-04	528	52	476	3,158	219	2,938
Dec-04	495	52	443	3,033	226	2,806
Jan-05	516	52	464	3,184	228	2,955
Feb-05	520	53	467	3,223	227	2,996
Mar-05	502	45	456	3,148	233	2,916
Apr-05	510	47	463	3,133	229	2,904
May-05	536	51	485	3,169	228	2,941
Jun-05	518	47	471	3,186	228	2,958
Jul-05	518	46	472	3,151	227	2,924
Aug-05	522	44	478	3,166	224	2,941

Month-over-month growth rates

Aug-04	0.6	-1.7	0.9	1.8	-2.2	2.2
Sep-04	1.5	0.7	1.6	-1.2	0.2	-1.3
Oct-04	-0.1	2.6	-0.4	-0.1	0.9	-0.2
Nov-04	4.8	-2.2	5.6	2.9	-3.3	3.3
Dec-04	-6.3	-0.4	-7.0	-4.0	3.3	-4.5
Jan-05	4.3	0.2	4.8	5.0	0.8	5.3
Feb-05	0.7	0.9	0.7	1.2	-0.3	1.4
Mar-05	-3.5	-13.7	-2.4	-2.3	2.2	-2.7
Apr-05	1.6	2.8	1.5	-0.5	-1.6	-0.4
May-05	5.1	8.6	4.8	1.1	-0.5	1.3
Jun-05	-3.3	-7.4	-2.9	0.5	0.1	0.6
Jul-05	0.0	-2.7	0.2	-1.1	-0.4	-1.2
Aug-05	0.9	-2.8	1.3	0.5	-1.1	0.6

¹Source: Statistics Canada & BC Stats.

Explanatory Notes

Data Sources

All room revenue data reported is compiled by BC STATS using the hotel tax database maintained and administered by the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Traveller Entry data is from Statistics Canada. All other data sources are accredited within the report.

Accommodation Categories

Each property has been assigned to one of eight accommodation categories. In addition to motels and four sizes of hotels, there are three special accommodation categories:

Fishing Lodges – All inland and coastal fishing camps located on or near lakes, rivers and oceans. Includes lodges which offer inland fishing expeditions, marinas with accommodation and lodges offering the services of fishing guides.

Vacation Rentals – Includes beach houses, cabins, and selected trailer parks. May also include certain inns and apartment complexes.

Miscellaneous – Includes guest ranches; outfitting, adventure hunting and other types of outdoor adventure; lodges that cater to skiers, hikers, etc. (with the exception of those lodges that mainly service cabins); bed and breakfasts; and houseboats. Also includes universities, mining firms, farms and other establishments renting rooms whose primary activity is not accommodation.

Seasonally Adjusted Data

Accommodation revenue exhibits large, regular seasonal fluctuations, characterised by peaks in the summer months and troughs in the winter months.

The *Tourism Sector Monitor* report uses Statistics Canada's X11/ARIMA/88 technique to remove the effects of seasonality from the revenue time series. The resulting seasonally adjusted series provides a useful tool for the analysis of underlying trends in accommodation revenue.

Unless otherwise indicated, revenue data in the *Tourism Sector Monitor* report is adjusted for seasonal fluctuations.

Tourism Sector Monitor is prepared by BC STATS, Ministry of Management Services, using data from the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Limitations

The data reported here is derived from the hotel tax database. Tax is not payable for several kinds of accommodation, including:

1. properties with three or fewer rooms (such as small bed and breakfast operations);
2. room rentals exceeding one month in duration;
3. lodging where the daily rate is below \$20;
4. lodging supplied to passengers of a ship or train while the ship or train is in transit or is making a scheduled stopover in the Province;
5. lodging supplied by employers to employees; and,
6. lodging supplied to consular employees and their staff.

Readers wishing more information regarding the nature of the hotel tax are referred to the Hotel Room Tax Act and the Hotel Room Tax Regulations.

Room Counts

Data are obtained primarily from Tourism BC's *Accommodation Guide* and supplemented by estimates from the Consumer Taxation Branch's hotel tax file. Vendors and their rooms are not counted in any given month unless revenue has been reported.

Suppression

The protection of confidentiality requires the suppression of categories not containing at least four properties. In most cases, protection is achieved by aggregating confidential cells into larger categories.

Revisions

A standard revision cycle accommodates corrections to the source data, to the allocation of consolidated reporters, and to the coding of properties by accommodation type. Revisions are implicit in the seasonally adjusted data and in the month-over-month, year-over-year and year-to-date percentage changes of subsequent reports, and are comprehensively reported in the annual tables published in the Annual issue of the *Tourism Sector Monitor* report.

Visit BC STATS on the World Wide Web at www.bcstats.gov.bc.ca

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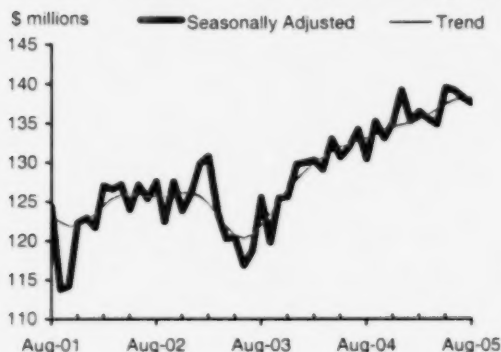
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Tourism Sector Monitor ♦ November 2005

Room Revenue

Room revenues continued to slip (-0.5%, *seasonally adjusted*) in August with revenues declining in all regions except Mainland/Southwest (+0.7%). Cariboo (-9.1%) and Northeast (-7.0%) experienced the biggest declines, but revenues were also off significantly in North Coast (-4.6%). In Vancouver Island/Coast, revenues slipped (-0.5%) for the third straight month in August.

Room revenues down again in August



Large hotels (250+ rooms) were busier (+1.4%) in August but other types of accommodation did not fare as well. Hotels with 151-250 rooms experienced a third consecutive decrease (-0.4%) in revenues. Revenues at mid-sized hotels were flat, while smaller properties (1-75 rooms) posted declines (-2.4%). In addition, motel operators saw revenues decline 7.1% in August. Revenues for other types of accommodations were flat.

Table 1. Room Revenue
(*seasonally adjusted*)

Accommodation Type			
	Aug 05 (\$000)	June 05 (\$000)	% change
Total	137,542	138,198	-0.5
Hotels	102,082	102,000	+0.4
Motels	16,343	17,596	-7.1
Other Accommodations	19,554	19,581	0.0
Regions (Top 3 performers)			
Mainland/Southwest	73,879	73,366	+0.7
Nechako	796	797	-0.2
Thompson-Okanagan	20,484	20,564	-0.4

Visitor Entries

Visitor entries to Canada through BC border crossings continued to decline (-1.6%, *seasonally adjusted*) in August with fewer visitors from most parts of the world. Entries from the US were down 1.4% and overseas visits decreased (-2.7%) largely because Asian entries were weak (-6.6%). There were fewer visitors from most Asian countries. Entries from Europe were flat, and travel from Oceania (-4.4%) was also off.

The number of Canadians re-entering the country through BC borders climbed (+3.9%) in August with 2.5% more people returning home from overseas.

Visitor entries continued to decline

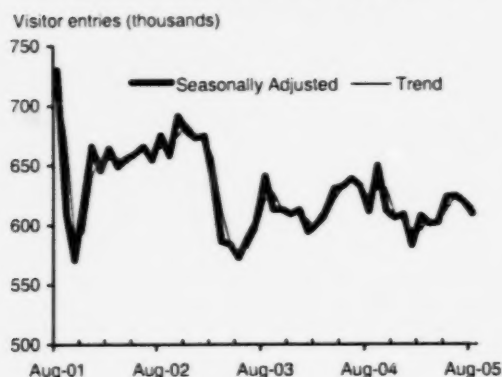


Table 2. Traveller Entries
(seasonally adjusted)

	Aug-05 (⁰⁰⁰)	Jul-05 (⁰⁰⁰)	% chg from Aug-05
American visitors			
Total	486	492	-1.4
Same-day	193	196	-1.7
Overnight	289	293	-1.3
Overseas visitors			
Total	124	127	-2.7
Europe	42	42	0.0
UK	21	21	1.7
Asia	59	63	-6.6
Japan	21	22	-5.4
Taiwan	6	8	-21.5
Oceania	13	14	-4.4

Note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Other Indicators

Other tourism indicators gave mixed signals in August.

The occupancy rate in BC hotels was down 0.4 percentage points (to 63.6%), but room prices increased 0.3% to an average of \$118.60.

The Consumer Price Index for traveller accommodation continued to fall (-3.0%) for the seventh consecutive month. Passenger traffic at the Vancouver airport was down 1.2% in August, but traffic through Victoria increased (+0.7%). Fewer passenger vehicles (-1.3%) passed the toll booth of the Coqui-

halla highway but both vehicle (+0.4%) and passenger (+0.7%) volumes aboard BC Ferries increased after falling in July.

The cost of restaurant food inched up (+0.1%) in August. Sales at drinking places (-2.8%) were off, but receipts at food services establishments improved (+1.3%), boosting overall restaurant, caterer and tavern receipts (+0.9%).

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Aug-05	Change from Jul-05
Hotel Industry		
Occupancy rate	63.6	-0.4 pp.
Average room charge (Pamell Kerr Forster)	118.60	0.3%
Airport Passengers (000s) (%)		
Vancouver International Airport		
Total traffic	1,359	-1.2
US (trans-border)	327	-1.3
Other International	332	-3.4
Canada (domestic) (YVR)	701	0.0
Victoria International Airport		
Total traffic (Victoria Airport Authority)	108	0.7
Restaurant Receipts (\$ millions) (%)		
All establishments	522	0.9
Food service	478	1.3
Drinking places (Statistics Canada)	44	-2.8
Transportation (000s) (%)		
Coquihalla Highway		
Passenger Vehicles (Ministry of Transportation & Highways)	220	-1.3
BC Ferries		
Vehicle Volume	710	0.4
Passenger Volume (BC Ferries)	1,808	0.7
Exchange Rates Cdn \$		
US \$	0.818	0.01
UK Pound	0.467	0.00
Japanese Yen	91.827	0.26
Australian \$ (Statistics Canada)	1.091	0.00

Note: pp. percentage points

Note to readers: all data in the *Tourism Sector Monitor* are reported on a seasonally adjusted basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues climbed (+3.1%, *seasonally adjusted*) in September as seven regions reported growth in revenues. North Coast (-1.5%) was the lone exception.

Hotel revenues rose (+2.2%) in September with increases recorded at all types of hotel establishments. Motel receipts rebounded (+1.6%) after falling in August. Vacation rentals (+3.9%) and non-standard accommodations (+3.8%) including fishing lodges and bed and breakfasts also made gains.

Other tourism indicators were also robust in September. Visitor entries were up (+1.8%, *seasonally adjusted*) with more visitors coming from both the US (+1.9%) and overseas (+1.2%).

Passenger traffic increased at the Vancouver (+1.3%) and Victoria (+3.6%) airports in September. There were also more passengers (+1.1%) aboard BC Ferries, but the volume of vehicles was flat. In addition, more passenger vehicles (+1.9%) travelled on the Coquihalla highway.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

How accurate is the preliminary data? Over 17 reports in 2003 and 2004, room revenues changed (rose or fell on a month-over-month basis) on average by 2.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were off by an average of 0.5 percentage points. This represents a margin of error of 19%. For example, if the preliminary figure is 1.3%, the actual number probably ranges from 1.1% to 1.5%.

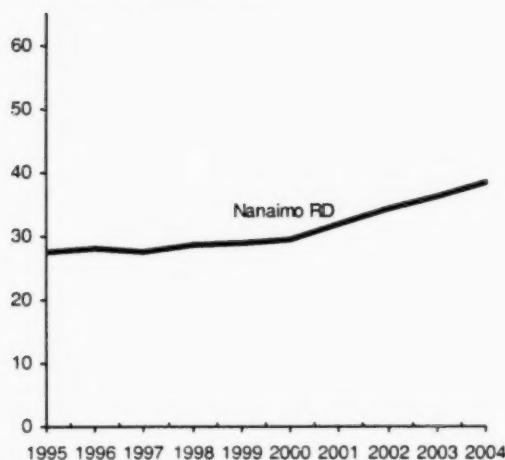
Special Focus: Nanaimo Regional District

Nanaimo Regional District is the second largest regional district in the Vancouver Island/Coast area, contributing more than \$38 million to BC's total room revenue in 2004.

Nanaimo Regional District boasts one of the mildest climates in Canada, and its proximity to Mount Washington ski resort means that visitors can enjoy numerous recreational opportunities. During winter months, they can ski in the morning and golf or sail in the afternoon. With the region including popular tourist destinations such as the city of Nanaimo, Parksville, Qualicum Beach and Coombs, the Nanaimo Regional District offers visitors a variety of activities such as hiking, fishing and nature exploring in summer, and skiing and snowmobiling in winter.

Room revenues picking up speed in Nanaimo Regional District

Room Revenues (\$ millions)



Source: BC STATS

The name Nanaimo is derived from the Coast Salish word "Snuneymuxw", which means 'great and mighty people'. The city of Nanaimo has a beautiful harbour front,

and is the second largest city in the Vancouver Island/Coast region. Nanaimo has unique heritage attractions, a burgeoning arts and culture scene and a myriad of recreational activities to suit every budget.

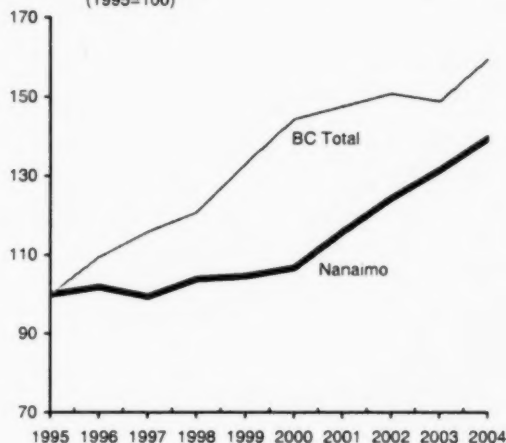
Nanaimo Regional District room revenues up in 2004

Room revenues in the Nanaimo Regional District increased only marginally between 1995 and 1999, but began to pick up speed in 2000. Since then, revenue growth in the region has outpaced increases in other areas such as the Capital Regional District and Vancouver Island/Coast as a whole.

The Nanaimo Regional District grew 39.3% between 1995 and 2004 compared to Vancouver Island/Coast (+52.6%), and BC total (+58.3%). The increase was largely localized in the city of Nanaimo where revenues shot up 167.9% during this period.

Nanaimo Regional District also growing faster than the BC average

Room Revenue Index (1995=100)

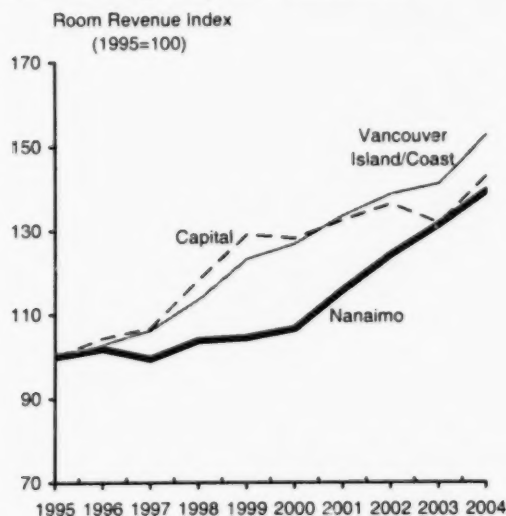


Source: BC STATS

Room revenues at all types of establishments in the Nanaimo Regional District posted strong growth (+6.0%) in 2004, with particularly strong increases at hotels (+8.1%), motels (+6.1%) and bed and breakfasts (+13.5%).

Other accommodation establishments also experienced room revenue growth in 2004. Revenues increased more than twenty percent at both fresh-water fishing and salt-water fishing lodges. Business was also up at campgrounds (+0.8%) and vacation rentals (+3.6%), which provide visitors with different accommodation choices to suit their individual interest and budget.

Revenues increasing faster in Nanaimo Regional District than in other areas on the Island during the period since 2000

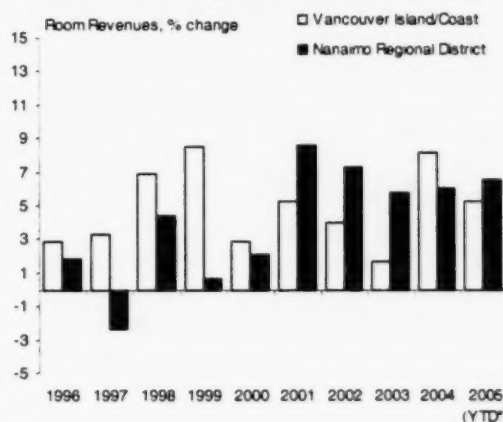


Data Source: BC STATS

Nanaimo Regional District only represents about 13% of the Vancouver Island/Coast region's room revenues, but it has become an important source of revenue growth in the region. The district experienced an increase (+6.5%) in room revenues during the first eight months of 2005 relative to the same period of 2004, outperforming Vancouver Island/Coast as a whole (+5.3%)

and the Capital Regional District (+5.1%), which accounts for about 60% of the revenues in the Vancouver Island/Coast region.

Nanaimo continued to outperform the Capital Regional District in 2005



*YTD, year-to date growth covers the period from January to August 2005 compared to the same period in 2004.

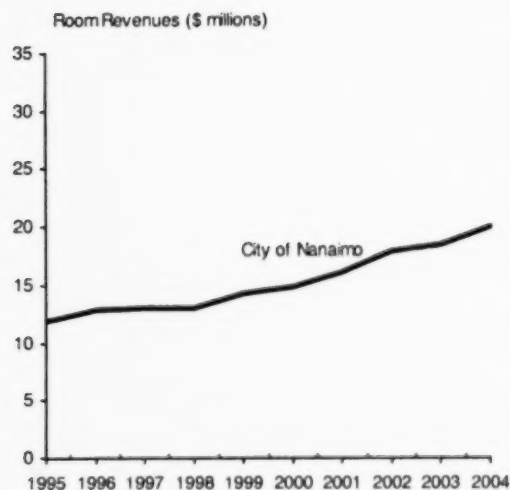
Data Source: BC STATS

The City of Nanaimo

The city of Nanaimo is located north of Victoria and is a transfer point, as it is easily accessible from Vancouver via BC Ferries at Departure Bay and Duke Point. As a result, many visitors use Nanaimo as their point of entry to the Vancouver Island/Coast region, which has benefited accommodation properties in the city.

The city of Nanaimo is an important source of revenue growth for Nanaimo Regional District and the Vancouver Island/Coast region. In the first eight months of 2005, double-digit growth of 11.5% was recorded in the city of Nanaimo compared to the same period in 2004. This was nearly double the increase in the city of Victoria (+5.9%), the largest city in the Vancouver Island/Coast region.

City of Nanaimo experienced double-digit growth in the first eight months of 2005



Data Source: BC STATS

Room revenue rose in all types of accommodation establishments with the most growth in hotels (+12.1%), as mid-size hotels (150–250 rooms, +20.9%) were much busier in the first eight months of 2005. Motels (+7.6%) and bed and breakfasts (+7.6%) also fared well compared to the same period of 2004.

The hotel occupancy rate in the city of Nanaimo climbed to 67.0% (*seasonally adjusted*) in August 2005, surpassing the Vancouver Island/Coast region (+64.4%), and other areas in the region such as Greater Victoria (+66.2%), and Parksville and Qualicum beach (+56.9%).

Hotel Occupancy rate in the city of Nanaimo surpassed Vancouver Island/Coast Region in 2005

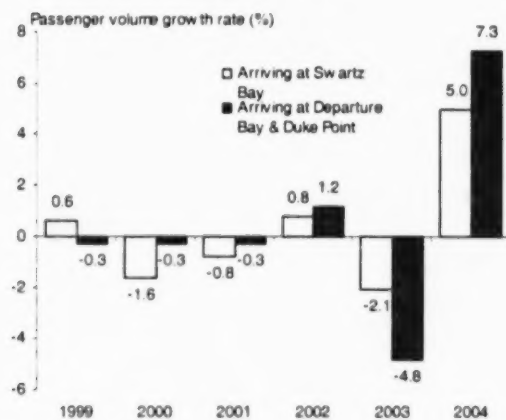


Data Source: Pannell Kerr Forster and BC STATS

Convenient ferry services allow the city of Nanaimo to be a popular stopover spot for travellers who travel not only to Vancouver Island/Coast, but also to Vancouver Island's largest ski destination, Mount Washington ski resort. Mount Washington has long been known for having good snow conditions from early in winter to well past Easter. This accounts, in part, for Mount Washington being the second-busiest winter recreation destination in BC, behind Whistler/Blackcomb located in the lower Mainland. The city of Nanaimo is much closer to Mount Washington than Victoria for people who travel from the mainland.

Overall, both vehicle (+8.4%) and passenger (+7.3%) volumes arriving at Departure Bay and Duke Point climbed in 2004, outperforming Swartz Bay in Victoria with 3.1% more vehicles and 5.1% more passengers aboard.

*More passengers recorded arriving at
Departure Bay & Duke Points than Swartz
Bay in 2004*



Data Source: BC Ferries

Table 1: Room Revenue by Development Region (\$000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,244	863,420	229,533	76,892	46,181	20,127	8,811	51,889	1,592,097

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	3.9	-1.3	12.2	7.1

Monthly data

Aug-04	24,606	70,424	18,631	6,198	3,902	1,744	735	4,181	130,421
Sep-04	25,184	73,673	19,297	6,460	3,822	1,661	776	4,332	135,206
Oct-04	24,726	71,434	19,060	6,272	3,913	1,704	740	5,253	133,101
Nov-04	25,232	71,709	19,937	6,511	3,951	1,744	766	5,211	135,060
Dec-04	26,274	74,483	20,304	6,285	4,735	1,532	788	4,815	139,217
Jan-05	26,016	71,324	20,304	6,267	3,863	1,629	838	5,005	135,245
Feb-05	25,510	70,829	20,895	6,198	4,233	1,700	1,007	6,060	136,432
Mar-05	26,560	70,048	21,103	6,143	4,182	1,736	1,002	4,756	135,528
Apr-05	25,931	70,623	20,881	6,369	4,723	1,672	907	3,770	134,876
May-05	25,977	73,532	21,052	6,571	4,363	2,009	906	5,091	139,502
Jun-05	25,694	74,613	20,349	6,529	4,218	1,774	770	5,195	139,142
Jul-05	25,533	73,366	20,564	6,799	4,390	1,757	797	4,993	138,198
Aug-05	25,393	73,879	20,484	6,681	3,992	1,676	796	4,642	137,542

Month-over-month growth rates

Aug-04	-0.3	-3.9	-4.1	-3.2	4.1	0.2	-2.1	1.4	-2.8
Sep-04	2.3	4.6	3.6	4.2	-2.0	-4.7	5.7	3.6	3.7
Oct-04	-1.8	-3.0	-1.2	-2.9	2.4	2.6	-4.6	21.2	-1.6
Nov-04	2.0	0.4	4.6	3.8	1.0	2.4	3.4	-0.8	1.5
Dec-04	4.1	3.9	1.8	-3.5	19.9	-12.1	3.0	-7.6	3.1
Jan-05	-1.0	-4.2	0.0	-0.3	-18.4	6.3	6.3	3.9	-2.9
Feb-05	-1.9	-0.7	2.9	-1.1	9.6	4.4	20.2	21.1	0.9
Mar-05	4.1	-1.1	1.0	-0.9	-1.2	2.1	-0.6	-21.5	-0.7
Apr-05	-2.4	0.8	-1.0	3.7	12.9	-3.7	-9.5	-20.7	-0.5
May-05	0.2	4.1	0.8	3.2	-7.6	20.2	-0.1	35.0	3.4
Jun-05	-1.1	1.5	-3.3	-0.6	-3.3	-11.7	-15.0	2.1	-0.3
Jul-05	-0.6	-1.7	1.1	4.1	4.1	-1.0	3.6	-3.9	-0.7
Aug-05	-0.5	0.7	-0.4	-1.7	-9.1	-4.6	-0.2	-7.0	-0.5

August month-over-month percent growth

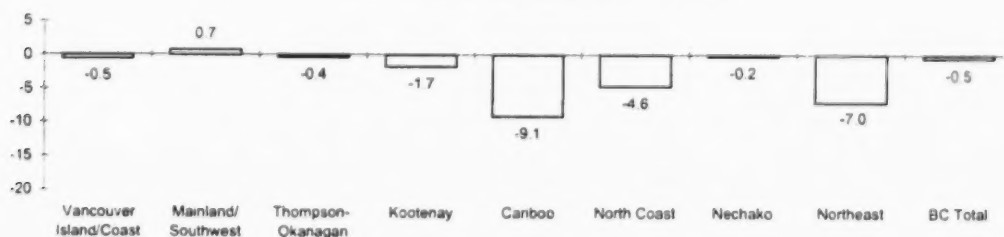


Table 2: Room Revenue by Accommodation Type (\$000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous Incl. Fishing Lodges
	251+	151-250	76-150	1-75			

Annual data

2000	442,226	201,392	293,035	171,564	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423
2004	467,820	198,608	321,679	185,692	195,041	124,433	98,824

Annual growth rates

2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
2004	6.8	9.8	8.2	6.6	7.5	4.1	3.6

Monthly data

Aug-04	38,176	16,381	26,364	15,461	15,579	10,454	8,264
Sep-04	40,319	17,069	27,087	15,948	16,306	10,646	8,794
Oct-04	37,379	16,631	26,996	16,008	16,429	11,310	8,308
Nov-04	37,639	17,809	28,100	15,774	17,707	11,112	8,504
Dec-04	42,785	17,372	27,237	15,634	17,209	11,226	8,459
Jan-05	38,995	16,600	27,197	15,038	16,580	11,234	8,107
Feb-05	38,638	17,019	27,675	15,913	17,383	10,739	8,292
Mar-05	38,636	17,012	27,861	16,692	17,830	10,218	8,207
Apr-05	35,754	17,624	27,726	16,531	18,012	8,260	7,647
May-05	39,621	17,703	28,636	17,330	18,085	10,365	9,408
Jun-05	39,736	17,423	28,709	17,194	17,281	11,138	8,578
Jul-05	38,868	17,401	28,739	16,992	17,596	11,069	8,512
Aug-05	39,427	17,327	28,745	16,582	16,343	11,039	8,515

Month-over-month growth rates

Aug-04	-2.7	-1.0	-2.6	-1.7	-5.6	0.6	-2.1
Sep-04	5.6	4.2	2.7	3.2	4.7	1.8	6.4
Oct-04	-7.3	-2.6	-0.3	0.4	0.8	6.2	-5.5
Nov-04	0.7	7.1	4.1	-1.5	7.8	-1.8	2.3
Dec-04	13.7	-2.5	-3.1	-0.9	-2.8	1.0	-0.5
Jan-05	-8.9	-4.4	-0.1	-3.8	-3.7	0.1	-4.2
Feb-05	-0.9	2.5	1.8	5.8	4.8	-4.4	2.3
Mar-05	0.0	0.0	0.7	4.9	2.6	-4.9	-1.0
Apr-05	-7.5	3.6	-0.5	-1.0	1.0	-19.2	-6.8
May-05	10.8	0.5	3.3	4.8	0.4	25.5	23.0
Jun-05	0.3	-1.6	0.3	-0.8	-4.4	7.5	-8.8
Jul-05	-2.2	-0.1	0.1	-1.2	1.8	-0.6	-0.8
Aug-05	1.4	-0.4	0.0	-2.4	-7.1	-0.3	0.0

August month-over-month percent growth

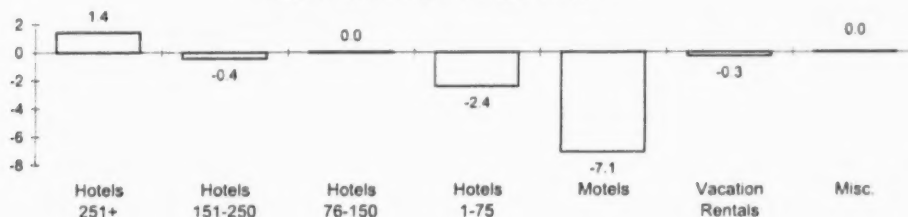


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Aug-05	YTD 05	Aug-04	YTD 04	Aug-05	Aug-04	Aug-05	Aug-04
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	26,809	126,040	-0.2	5.1	189	0	8,493	76
Total - Hotels	21,456	103,339	1.7	5.7	70	1	5,650	54
76+ Rooms	16,001	78,591	0.9	4.7	26	0	3,937	0
1-75 Rooms	5,454	24,748	4.4	9.0	44	1	1,713	54
Motels	2,353	10,931	-3.1	5.7	31	0	1,181	60
Vacation Rentals	1,069	4,002	-6.0	1.4	30	1	326	-46
19 Cowichan Valley								
Total - All accommodation types	1,425	6,648	12.3	10.8	39	1	682	14
Motels	366	1,692	32.5	23.6	18	1	339	15
21 Nanaimo								
Total - All accommodation types	7,120	30,052	11.0	8.3	74	-4	2,584	-91
Total - Hotels	3,332	14,807	19.3	7.8	19	-2	1,196	-90
Motels	1,360	6,001	-0.9	6.0	23	0	621	-4
Vacation Rentals	2,091	7,738	8.2	10.5	21	-1	594	-7
23 Alberni-Clayoquot								
Total - All accommodation types	8,246	30,722	8.2	10.6	68	0	1,560	3
Total - Hotels	2,024	7,378	12.1	4.0	13	0	497	22
Motels	947	3,151	6.7	8.5	20	-1	408	-8
Vacation Rentals	2,877	11,713	10.9	21.5	15	0	339	7
25 Comox-Strathcona								
Total - All accommodation types	5,353	22,545	2.3	0.7	93	0	2,198	77
Fishing lodges	1,621	4,285	2.8	0.3	24	-2	410	7
Motels	978	5,172	-1.0	-1.4	23	-1	647	16
Vacation Rentals	765	2,810	7.1	-1.7	23	1	294	14
27 Powell River								
Total - All accommodation types	609	2,748	21.7	-16.5	19	1	386	16
43 Mount Waddington								
Total - All accommodation types	1,144	4,043	0.4	2.3	25	-3	653	-79
45 Central Coast								
Total - All accommodation types	386	1,366	-3.3	-0.9	11	-2	141	-31
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	5,231	27,640	4.6	5.4	72	5	2,483	42
Total - Hotels	3,541	19,757	6.6	6.5	18	-1	1,349	-5
Motels	1,231	5,965	-2.3	8.1	39	1	946	13
15 Greater Vancouver								
Total - All accommodation types	88,135	468,483	6.4	4.3	253	2	27,092	-309
Total - Hotels	81,564	436,425	6.1	3.3	163	1	23,083	-261
251+ Rooms	42,379	230,470	3.2	-0.9	24	-1	9,472	-484
151-250 Rooms	15,659	84,741	6.9	6.4	26	1	4,952	200
76-150 Rooms	17,042	89,266	10.5	8.8	53	-1	5,745	-104
1-75 Rooms	6,485	31,948	13.6	13.3	60	2	2,914	127
Motels	2,886	13,523	13.3	10.7	39	1	1,641	18
Vacation Rentals	995	8,650	-8.6	47.1	20	1	693	98
29 Sunshine Coast								
Total - All accommodation types	872	3,465	10.7	12.1	23	-1	411	17
31 Squamish-Lillooet								
Total - All accommodation types	12,271	125,960	-7.0	-10.2	98	-1	7,266	-177
Total - Hotels	10,644	102,903	-4.8	-9.3	46	-1	5,526	-249
1-75 Rooms	848	7,414	-7.9	-22.0	19	-2	711	-116
Vacation Rentals	873	16,250	-24.3	-12.4	27	-1	1,234	23
Miscellaneous	550	5,617	-10.6	-18.8	18	1	337	49
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	10,586	34,012	10.4	8.5	119	-1	3,259	2
Total - Hotels	4,301	15,758	10.4	5.3	16	1	1,088	31
Motels	5,098	14,288	8.2	8.4	74	-4	1,749	-71

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Aug-05	YTD 05	Aug-04	YTD 04	Aug-05	Aug-04	Aug-05	Aug-04
33 Thompson-Nicola								
Total - All accommodation types	8,557	48,496	6.7	3.7	173	3	5,728	-4
Total - Hotels	3,827	21,956	9.7	3.9	38	1	2,237	-37
76+ Rooms	2,915	17,466	9.7	4.1	12	0	1,388	-1
1-75 Rooms	912	4,490	9.4	3.2	24	1	849	-36
Motels	3,240	14,795	5.4	3.2	77	1	2,319	32
Vacation Rentals	505	7,102	4.5	1.6	24	-1	598	-7
35 Central Okanagan								
Total - All accommodation types	18,977	55,244	8.3	19.9	63	-7	3,215	-367
Total - Hotels	6,925	36,031	13.2	12.2	19	0	1,710	0
Motels	2,652	10,206	4.0	1.1	28	-3	1,096	-63
Vacation Rentals	911	7,226	2.7	24.6	15	-3	245	-54
37 North Okanagan								
Total - All accommodation types	2,400	18,166	5.2	14.4	49	-3	1,992	-78
Motels	1,051	5,115	10.1	16.3	20	-1	592	-66
39 Columbia-Shuswap								
Total - All accommodation types	7,657	31,746	7.9	10.5	117	4	3,455	18
Total - Hotels	3,153	13,070	2.4	5.9	20	0	1,250	14
Motels	2,885	11,003	6.5	7.5	48	-2	1,516	-115
Kootenay								
01 East Kootenay								
Total - All accommodation types	6,778	38,933	3.0	-2.2	113	1	4,462	16
Total - Hotels	1,858	12,831	7.8	6.0	24	0	1,309	-8
Motels	1,907	8,358	-0.1	3.8	51	-1	1,214	-10
Vacation Rentals	1,481	8,376	12.1	-11.0	15	-1	948	14
03 Central Kootenay								
Total - All accommodation types	3,098	14,049	13.2	7.2	85	-1	1,843	-28
Total - Hotels	1,541	7,570	12.0	8.1	19	1	768	-1
Motels	835	3,512	9.7	8.1	32	0	555	-4
Vacation Rentals	387	1,269	19.0	16.5	18	-2	146	-11
05 Kootenay Boundary								
Total - All accommodation types	946	4,766	18.1	9.3	39	2	750	88
Motels	539	2,445	-1.6	3.1	24	1	434	52
Cariboo								
41 Cariboo								
Total - All accommodation types	2,670	13,071	0.4	8.6	111	-4	2,167	-26
Fishing lodges	162	544	5.9	2.0	18	1	161	7
Motels	1,185	6,815	-0.9	12.1	36	1	1,015	8
Vacation Rentals	287	819	-10.9	-8.1	31	-6	305	-49
53 Fraser-Fort George								
Total - All accommodation types	3,624	22,528	5.0	17.0	59	0	2,784	11
Total - Hotels	2,436	18,007	13.7	20.1	19	0	1,462	56
Motels	1,071	5,727	-9.8	11.7	29	0	978	-8
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	2,332	9,520	0.6	2.4	41	-2	1,161	-14
Motels	367	1,700	1.3	-1.5	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	1,000	5,996	6.1	6.7	36	1	848	28
Motels	313	2,143	5.4	7.8	15	0	378	14
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	1,231	6,779	11.8	18.6	55	-3	1,223	-1
Motels	650	3,656	11.4	14.4	24	-1	698	29
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	4,441	42,524	18.2	23.2	65	-7	2,767	-880
Total - Hotels	2,685	19,883	23.8	19.3	23	0	1,579	0
Motels	1,265	9,592	0	20.1	33	0	900	-23

* Data for regions with fewer than 10 properties reporting can not be released.

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Aug-05	YTD 05	Aug-04	YTD 04	Aug-05	Aug-04	Aug-05	Aug-04
Vancouver Island/Coast	50,555	223,628	2.3	5.3	516	-9	16,613	-99
Victoria (C)	20,812	100,627	1.6	5.9	68	5	5,843	215
Other CRD	4,744	19,427	-11.0	-4.2	90	-5	2,298	-158
Nanaimo (C)	2,844	15,384	9.6	11.5	24	1	1,239	13
Port Alberni (C)	753	2,920	24.1	11.1	15	-1	401	10
Courtenay (C)	1,039	6,106	21.2	7.3	12	2	467	45
Rest of Development Region	20,363	79,163	4.2	5.5	289	-9	6,385	-223
Mainland/Southwest	106,425	625,458	4.5	1.1	444	3	37,149	-530
Downtown Vancouver (C)	56,354	293,412	4.9	1.2	86	2	12,698	-129
Other Vancouver (C)	5,388	29,302	16.8	29.9	39	-1	2,915	181
Richmond (C)	13,204	74,053	10.4	8.8	26	1	4,537	200
Burnaby (C)	3,343	18,042	2.8	-3.9	11	-1	1,357	92
Other GVRD	9,841	53,662	6.1	7.4	90	0	5,572	-296
Whistler (DM)	11,238	120,470	-9.3	-11.0	73	-3	6,489	-407
Rest of Development Region	7,057	36,515	7.1	7.0	119	5	3,581	-171
Thompson/Okanagan	40,103	185,589	8.1	8.6	519	-6	17,193	-477
Penticton (C)	5,832	19,222	7.7	5.0	48	-2	1,750	-3
Kamloops (C)	5,883	36,183	6.2	1.2	73	1	3,760	-25
Kelowna (C)	9,392	49,798	10.6	12.7	45	-6	2,656	-334
Vernon (C)	2,085	15,021	7.0	15.3	30	-1	1,393	-63
Revelstoke (C)	2,218	11,184	-1.9	2.9	31	0	1,229	-36
Rest of Development Region	14,715	54,181	9.1	11.3	292	2	6,405	-16
Kootenay	10,776	57,678	6.5	9.7	234	-1	6,805	6
Cranbrook (C)	1,083	5,691	-1.5	6.5	17	-1	794	-29
Nelson (C)	996	4,659	18.9	1.7	12	-2	425	-15
Rest of Development Region	8,696	47,126	6.3	-0.1	217	0	6,011	35
Cariboo	6,237	35,542	2.1	13.6	167	-7	4,674	-72
Quesnel (C)	366	2,633	-6.8	7.1	11	-1	418	-9
Williams Lake (C)	611	3,650	-7.0	12.0	11	-1	542	-32
Prince George (C)	2,365	16,605	4.8	18.2	30	-1	1,961	-5
Rest of Development Region	2,875	12,654	3.4	9.8	115	-4	1,953	-26
North Coast	3,113	15,306	-4.3	2.7	76	-1	1,964	-15
Prince Rupert (C)	1,016	5,026	-3.0	-0.0	16	0	773	0
Terrace (C)	508	3,450	-1.9	7.6	13	0	426	3
Rest of Development Region	1,590	6,830	-5.8	2.5	47	-1	765	-18
Nechako	1,731	6,779	11.8	18.6	55	-3	1,223	-1
Smithers (T)	614	3,456	8.6	27.7	15	0	452	1
Rest of Development Region	616	3,323	15.3	10.5	40	-3	771	320
Northeast	4,441	42,524	10.2	23.2	65	-7	2,767	-880
Dawson Creek (C)	825	5,782	40.0	33.8	13	-1	471	-53
Fort St. John (C)	1,659	18,681	26.3	13.1	17	-3	987	-108
Rest of Development Region	1,957	18,061	-7.9	32.0	35	-3	1,299	-719

.. Data for regions with fewer than 10 properties reporting can not be released.

Table 5: Historical Unadjusted Room Revenue by Development Region (\$000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,244	863,420	229,533	76,892	46,181	20,127	8,811	51,889	1,592,097

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	3.9	-1.3	12.2	7.1

Monthly data

Aug-04	49,430	101,817	37,115	10,120	6,109	3,253	1,100	4,029	212,973
Sep-04	35,179	81,870	23,602	7,603	5,234	2,334	1,172	4,075	161,067
Oct-04	20,981	55,010	13,961	4,252	3,996	1,251	886	5,132	105,468
Nov-04	13,405	43,212	8,484	2,886	2,856	959	570	4,183	76,555
Dec-04	13,224	64,448	12,659	4,875	2,804	685	469	3,971	103,134
Jan-05	11,280	61,240	13,166	5,699	2,447	729	486	5,918	100,965
Feb-05	14,443	68,394	16,512	7,347	2,830	1,027	666	9,234	120,452
Mar-05	19,694	72,544	19,344	7,273	3,540	1,143	841	7,407	131,786
Apr-05	21,271	60,174	13,445	4,820	4,213	1,013	642	3,458	109,037
May-05	27,664	73,343	19,759	5,288	4,614	1,894	826	3,206	136,594
Jun-05	33,180	85,136	23,822	6,041	5,245	2,920	999	4,150	161,492
Jul-05	45,540	98,203	39,438	10,432	6,416	3,468	1,089	4,709	209,294
Aug-05	50,555	106,425	40,103	10,776	6,237	3,113	1,231	4,441	222,883

Year-over-year percent changes

Aug-04	5.2	0.6	0.2	1.5	9.7	4.7	-3.6	1.3	1.9
Sep-04	11.8	12.8	17.9	14.1	9.6	-0.2	7.4	15.2	13.1
Oct-04	5.4	5.2	1.2	0.2	5.9	3.7	-8.0	48.5	5.9
Nov-04	5.1	4.3	5.5	16.2	8.9	6.2	5.9	41.0	6.7
Dec-04	12.4	8.6	8.6	-3.0	27.5	-17.5	3.4	4.4	8.5
Jan-05	3.6	2.9	5.1	-3.0	7.5	-7.8	17.1	33.7	4.4
Feb-05	2.3	-0.1	9.5	-10.2	15.5	-0.6	45.0	46.0	3.7
Mar-05	13.9	-2.4	22.5	-6.4	9.8	9.9	65.8	12.8	4.1
Apr-05	9.1	-5.2	5.9	-3.7	30.7	-4.1	17.8	-5.5	-0.1
May-05	8.0	2.5	9.5	11.1	20.4	25.9	26.6	33.7	6.4
Jun-05	5.7	4.3	8.5	2.1	11.6	4.8	1.6	28.4	5.9
Jul-05	2.9	0.1	4.9	8.1	17.1	1.0	3.6	20.9	2.9
Aug-05	2.3	4.5	8.1	6.5	2.1	-4.3	11.8	10.2	4.7

August year-over-year percent change

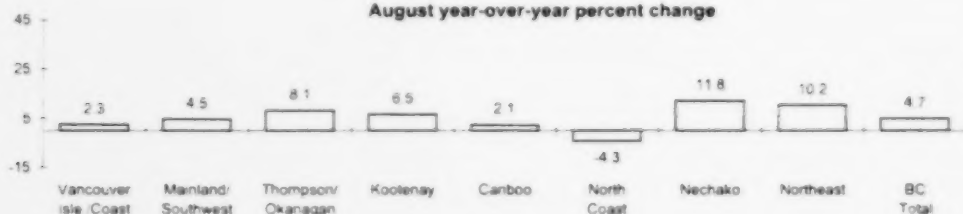


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**

Annual data

2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,970.8	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.8	118.0
2003	7,335.3	6,137.4	2,580.7	3,556.7	1,197.8	577.6	410.1	124.8
2004	7,427.8	6,022.5	2,477.6	3,561.5	1,405.3	715.8	458.1	144.3

Annual percent changes

2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.1	-4.3	-13.8	4.2	-3.0	4.4	-11.7	-10.5
2003	-8.0	-7.0	-8.1	-6.1	-12.9	-24.4	-0.4	5.8
2004	1.3	-1.9	-4.0	0.1	17.3	23.9	11.7	15.6

Monthly data

Sep-04	649.6	529.7	200.2	301.9	119.8	58.2	40.1	12.5
Oct-04	611.8	493.2	204.5	291.8	118.6	58.4	39.6	11.7
Nov-04	605.9	493.3	202.5	295.9	112.6	56.2	36.3	12.1
Dec-04	609.0	492.9	200.2	291.5	116.1	55.8	39.4	12.2
Jan-05	583.0	467.0	180.3	289.2	116.1	54.9	40.6	12.3
Feb-05	607.8	485.7	198.9	290.9	122.1	61.3	40.6	12.6
Mar-05	601.0	477.5	195.5	283.9	123.5	63.1	42.1	12.3
Apr-05	602.2	475.2	192.7	286.1	127.0	64.8	42.0	12.0
May-05	623.6	494.8	201.1	297.0	128.9	63.7	42.8	15.4
Jun-05	624.5	495.9	202.7	290.9	128.6	63.8	42.2	14.1
Jul-05	619.5	492.4	196.4	292.8	127.1	63.2	42.5	14.0
Aug-05	609.3	485.7	193.1	288.9	123.6	59.0	42.5	13.4
Sep-05	620.1	495.0	198.1	292.4	125.1	58.8	43.1	13.8

Month-over-month growth rates

Sep-04	6.3	7.2	-0.4	1.3	2.2	-3.3	3.5	-1.4
Oct-04	-5.8	-6.9	2.2	-3.3	-1.1	0.3	-1.2	-6.8
Nov-04	-1.0	0.0	-1.0	1.4	-5.1	-3.6	-8.4	3.6
Dec-04	0.5	-0.1	-1.1	-1.5	3.1	-0.9	8.5	1.1
Jan-05	-4.3	-5.3	-9.9	-0.8	0.0	-1.6	2.9	1.0
Feb-05	4.2	4.0	10.3	0.6	5.2	11.8	0.1	1.8
Mar-05	-1.1	-1.7	-1.7	-2.4	1.2	2.9	3.7	-2.5
Apr-05	0.2	-0.5	-1.4	0.8	2.8	2.7	-0.2	-2.3
May-05	3.6	4.1	4.3	3.8	1.5	-1.7	1.8	28.8
Jun-05	0.1	0.2	0.8	-2.0	-0.2	0.2	-1.4	-8.6
Jul-05	-0.8	-0.7	-3.1	0.7	-1.2	-1.0	0.7	-0.9
Aug-05	-1.6	-1.4	-1.7	-1.3	-2.7	-6.6	0.0	-4.4
Sep-05	1.8	1.9	2.6	1.2	1.2	-0.3	1.4	3.1

* Seasonally adjusted totals for US and overseas entries are calculated by Statistics Canada, and are adjusted to sum to national totals. Therefore, same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)					Other Transportation (000s)		
	Vancouver				Victoria	BC Ferries		Coquitlam Hwy Passenger Vehicles
	Total	Domestic	Trans-border	Other int'l.		Vehicles	Passengers	

Annual data

2000	16,033	8,306	4,074	3,652	1,139	7,887	21,280	2,400
2001	15,477	7,869	4,000	3,608	1,158	8,104	21,309	2,461
2002	14,877	7,422	3,855	3,600	1,102	8,272	21,540	2,530
2003	14,322	7,267	3,815	3,241	1,183	8,263	21,348	2,480
2004	15,725	7,986	3,965	3,775	1,250	8,532	21,955	2,586

Annual growth rates

2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.7	2.7	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.8	2.1	1.1	2.8
2003	-3.7	-2.1	-1.0	-10.0	7.3	-0.1	-0.9	-2.0
2004	9.8	9.9	3.9	16.5	5.7	3.3	2.8	4.3

Monthly data

Sep-04	1,345	685	338	321	109	714	1,832	223
Oct-04	1,328	676	336	316	104	717	1,853	215
Nov-04	1,340	682	341	317	105	726	1,861	221
Dec-04	1,348	693	338	318	107	749	1,909	216
Jan-05	1,378	719	344	316	108	681	1,722	206
Feb-05	1,359	704	331	324	110	726	1,855	228
Mar-05	1,375	700	348	327	112	723	1,841	224
Apr-05	1,360	680	341	340	110	720	1,832	221
May-05	1,392	692	350	350	109	723	1,859	228
Jun-05	1,376	705	330	341	110	715	1,816	224
Jul-05	1,375	701	331	344	107	707	1,795	223
Aug-05	1,359	701	327	332	108	710	1,808	220
Sep-05	1,377	705	337	335	112	710	1,827	224

Month-over-month growth rates

Sep-04	1.5	2.6	1.0	-0.2	6.9	2.3	2.0	6.2
Oct-04	-1.2	-1.3	-0.6	-1.8	-4.4	0.4	1.1	-3.4
Nov-04	0.9	0.8	1.4	0.3	1.0	1.3	0.4	2.9
Dec-04	0.7	1.6	-1.0	0.3	2.3	3.2	2.6	-2.2
Jan-05	2.2	3.8	1.7	-0.6	0.9	-9.2	-9.8	-4.7
Feb-05	-1.4	-2.1	-3.6	2.7	1.8	6.6	7.8	10.4
Mar-05	1.1	-0.6	5.0	1.0	1.7	-0.4	-0.8	-1.6
Apr-05	-1.0	-2.8	-2.1	3.8	-2.2	-0.4	-0.5	-1.3
May-05	2.3	1.8	2.6	2.9	-0.7	0.5	1.5	3.2
Jun-05	-1.1	1.8	-5.6	-2.3	1.2	-1.1	-2.3	-2.0
Jul-05	0.0	-0.6	0.4	0.7	-3.2	-1.1	-1.2	-0.5
Aug-05	-1.2	0.0	-1.3	-3.4	0.7	0.4	0.7	-1.3
Sep-05	1.3	0.6	3.2	0.9	3.6	0.0	1.1	1.9

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel Industry ²		Consumer Price Index ¹	
	Total tourism related	Air transport ⁴	Accommodation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%) ³	Room Rate (\$)	Traveller accommodation	Restaurant food ⁴

Annual data

2000	188.4	14.8	28.2	116.7	28.8	60.0	114.06	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.13	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	117.00	124.1	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	113.72	111.8	127.6
2004	193.2	13.0	27.6	117.8	34.8	61.4	115.58	102.5	129.9

Annual Growth Rates

2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.6	0.8	-6.9	3.4
2003	1.1	4.4	-0.7	-0.3	6.8	-1.0	-2.8	-9.9	1.8
2004	0.2	2.2	-4.7	0.0	4.3	5.3	1.6	-8.4	1.8

Monthly data

Sep-04	193.3	13.2	27.6	116.8	35.7	61.3	115.30	101.2	130.0
Oct-04	192.0	13.3	27.5	116.2	35.0	62.0	115.00	102.0	130.3
Nov-04	194.0	13.2	27.4	117.8	35.6	62.8	115.70	103.2	130.6
Dec-04	195.3	13.1	27.6	118.4	36.2	63.3	117.60	103.2	131.9
Jan-05	195.3	13.2	27.8	118.5	35.7	61.5	112.50	103.6	131.7
Feb-05	195.5	13.1	28.3	118.2	35.9	62.8	113.10	102.8	132.0
Mar-05	194.6	13.0	28.2	117.5	36.0	63.5	113.20	101.8	132.3
Apr-05	193.7	13.1	28.4	117.2	35.0	62.8	114.40	100.2	132.6
May-05	195.8	13.2	28.6	117.9	36.0	65.6	116.80	99.3	133.1
Jun-05	196.6	13.2	28.5	118.6	36.4	64.5	118.00	98.7	134.5
Jul-05	197.7	13.2	28.8	118.9	36.8	64.0	118.30	98.2	134.4
Aug-05	197.2	13.4	28.6	118.4	36.9	63.6	118.60	95.3	134.5
Sep-05	197.7	13.3	28.8	119.1	36.6	66.6	119.60	98.7	134.7

Month-over-month growth rates

Sep-04	-0.4	0.5	-0.1	-1.1	1.2	0.5	-0.3	-0.6	0.2
Oct-04	-0.7	0.8	-0.3	-0.5	-2.2	0.7	-0.3	0.8	0.2
Nov-04	1.0	-0.8	-0.3	1.3	1.8	0.8	0.6	1.2	0.2
Dec-04	0.7	-1.1	0.7	0.5	1.8	0.5	1.6	0.0	1.0
Jan-05	0.0	1.3	0.8	0.0	-1.4	-1.8	-4.3	0.4	-0.2
Feb-05	0.1	-1.2	1.8	-0.2	0.4	1.3	0.5	-0.8	0.2
Mar-05	-0.5	-0.7	-0.6	-0.6	0.3	0.7	0.1	-1.0	0.2
Apr-05	-0.5	0.9	0.9	-0.3	-2.8	-0.7	1.1	-1.6	0.2
May-05	1.1	0.8	0.5	0.7	3.0	2.8	2.1	-0.9	0.4
Jun-05	0.4	-0.3	-0.4	0.6	1.0	-1.1	1.0	-0.6	1.1
Jul-05	0.5	0.4	1.3	0.2	1.1	-0.5	0.3	-0.5	-0.1
Aug-05	-0.3	0.9	-0.9	-0.4	0.3	-0.4	0.3	-3.0	0.1
Sep-05	0.3	-0.6	0.6	0.7	-0.8	3.0	0.8	3.6	0.1

¹Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

²Source: Pannell Kerr Forster and BC Stats

³Occupancy Rate change expressed as percentage point change

⁴No identifiable seasonality.

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns ¹					
	Receipts (\$ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services

Annual data

2000	5,079.6	505.6	4,574.1	32,568.0	2,487.5	30,080.5
2001	5,317.2	533.7	4,783.5	33,743.3	2,602.8	31,140.5
2002	5,403.0	546.2	4,856.8	34,527.9	2,610.2	31,917.7
2003	5,654.4	584.9	5,069.5	35,043.2	2,626.9	32,416.4
2004	5,969.2	625.0	5,344.1	36,670.1	2,707.4	33,962.7

Annual growth rates

2000	5.3	5.3	5.2	6.9	4.3	7.2
2001	4.7	5.6	4.6	3.6	4.6	3.5
2002	1.6	2.3	1.5	2.3	0.3	2.5
2003	4.7	7.1	4.4	1.5	0.6	1.6
2004	5.6	6.9	5.4	4.6	3.1	4.8

Monthly data

Sep-04	507	52	455	3,069	227	2,842
Oct-04	504	53	451	3,070	229	2,840
Nov-04	528	52	475	3,159	221	2,939
Dec-04	495	52	443	3,028	229	2,800
Jan-05	520	54	466	3,218	236	2,982
Feb-05	533	56	477	3,220	232	2,988
Mar-05	505	48	457	3,133	236	2,898
Apr-05	513	50	463	3,122	231	2,891
May-05	535	54	481	3,133	230	2,904
Jun-05	517	49	468	3,148	228	2,919
Jul-05	516	49	467	3,122	230	2,892
Aug-05	520	47	473	3,132	225	2,907
Sep-05	511	43	468	3,144	208	2,936

Month-over-month growth rates

Sep-04	2.4	2.3	2.4	-1.8	2.5	-2.1
Oct-04	-0.6	2.2	-0.9	0.0	0.9	-0.1
Nov-04	4.7	-2.0	5.5	2.9	-3.7	3.5
Dec-04	-6.1	-0.2	-6.8	-4.1	3.6	-4.7
Jan-05	4.9	3.0	5.1	6.3	3.0	6.5
Feb-05	2.6	4.2	2.4	0.1	-1.6	0.2
Mar-05	-5.3	-13.8	-4.3	-2.7	1.6	-3.0
Apr-05	1.5	2.4	1.4	-0.4	-1.8	-0.2
May-05	4.3	9.4	3.7	0.3	-0.7	0.4
Jun-05	-3.3	-8.9	-2.7	0.5	-0.6	0.5
Jul-05	-0.3	-1.0	-0.2	-0.8	0.7	-0.9
Aug-05	0.9	-3.9	1.4	0.3	-2.2	0.5
Sep-05	-1.7	-7.8	-1.1	0.4	-7.5	1.0

¹Source: Statistics Canada & BC Stats.

Explanatory Notes

Data Sources

All room revenue data reported is compiled by BC STATS using the hotel tax database maintained and administered by the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Traveller Entry data is from Statistics Canada. All other data sources are accredited within the report.

Accommodation Categories

Each property has been assigned to one of eight accommodation categories. In addition to motels and four sizes of hotels, there are three special accommodation categories:

Fishing Lodges – All inland and coastal fishing camps located on or near lakes, rivers and oceans. Includes lodges which offer inland fishing expeditions, marinas with accommodation and lodges offering the services of fishing guides.

Vacation Rentals – Includes beach houses, cabins, and selected trailer parks. May also include certain inns and apartment complexes.

Miscellaneous – Includes guest ranches; outfitting, adventure hunting and other types of outdoor adventure; lodges that cater to skiers, hikers, etc. (with the exception of those lodges that mainly service cabins); bed and breakfasts; and houseboats. Also includes universities, mining firms, farms and other establishments renting rooms whose primary activity is not accommodation.

Seasonally Adjusted Data

Accommodation revenue exhibits large, regular seasonal fluctuations, characterised by peaks in the summer months and troughs in the winter months.

The *Tourism Sector Monitor* report uses Statistics Canada's X11/ARIMA/88 technique to remove the effects of seasonality from the revenue time series. The resulting seasonally adjusted series provides a useful tool for the analysis of underlying trends in accommodation revenue.

Unless otherwise indicated, revenue data in the *Tourism Sector Monitor* report is adjusted for seasonal fluctuations.

Tourism Sector Monitor is prepared by BC STATS, Ministry of Management Services, using data from the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Limitations

The data reported here is derived from the hotel tax database. Tax is not payable for several kinds of accommodation, including:

1. properties with three or fewer rooms (such as small bed and breakfast operations);
2. room rentals exceeding one month in duration;
3. lodging where the daily rate is below \$20;
4. lodging supplied to passengers of a ship or train while the ship or train is in transit or is making a scheduled stopover in the Province;
5. lodging supplied by employers to employees; and,
6. lodging supplied to consular employees and their staff.

Readers wishing more information regarding the nature of the hotel tax are referred to the Hotel Room Tax Act and the Hotel Room Tax Regulations.

Room Counts

Data are obtained primarily from Tourism BC's *Accommodation Guide* and supplemented by estimates from the Consumer Taxation Branch's hotel tax file. Vendors and their rooms are not counted in any given month unless revenue has been reported.

Suppression

The protection of confidentiality requires the suppression of categories not containing at least four properties. In most cases, protection is achieved by aggregating confidential cells into larger categories.

Revisions

A standard revision cycle accommodates corrections to the source data, to the allocation of consolidated reporters, and to the coding of properties by accommodation type. Revisions are implicit in the seasonally adjusted data and in the month-over-month, year-over-year and year-to-date percentage changes of subsequent reports, and are comprehensively reported in the annual tables published in the Annual issue of the *Tourism Sector Monitor* report.

Visit BC STATS on the World Wide Web at www.bcstats.gov.bc.ca

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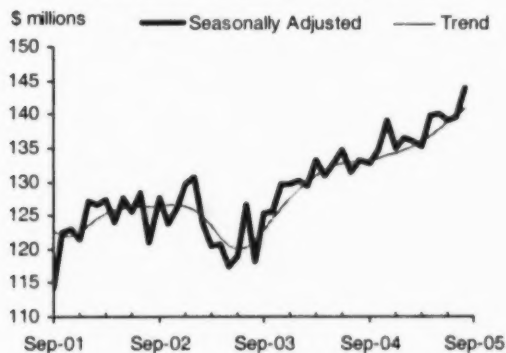
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Tourism Sector Monitor ♦ December 2005

Room Revenue

Room revenues advanced (+3.1%, seasonally adjusted) in September, with revenues jumping in all regions except North Coast (-1.5%). Northeast (+12.7%), Cariboo (+5.0%) and Kootenay (+2.0%) experienced some of the biggest increases in revenues, after observing declines in August. Room revenues were also up in BC's biggest regions, Mainland Southwest (+3.9%) and Vancouver Island/Coast (+0.6%). In Nechako (+2.7%) and Thompson-Okanagan (+1.4%), revenues continued an upward trend for the third straight month in September.

Room revenues up in September



All accommodation types fared well in September. Large hotels (250+ rooms) continued to be busy (+1.9%) in September, and revenues at hotels with 151-250 rooms (+3.1%) and smaller properties with less than 76 rooms (+4.1%) climbed after dipping in August. Revenues for midsize hotels (76-150 rooms) also increased (+1.1%). In addition, motel operators saw a growth of 1.7% in revenues in September. Revenues for other types of accommodations (+1.1%) were also up.

Table 1. Room Revenue
(seasonally adjusted)

Accommodation Type			
	Sep 05 (\$000)	Aug 05 (\$000)	% change
Total	143,846	139,517	+3.1
Hotels	105,674	103,345	+1.9
Motels	16,939	16,661	+1.7
Other Accommodations	20,493	19,727	+1.1
Regions (Top 3 performers)			
Northeast	5,362	4,757	+12.7
Cariboo	4,228	4,027	+5.0
Mainland/Southwest	78,169	75,210	+3.9

Visitor Entries

The number of travellers entering Canada via BC borders was up (+1.3%, seasonally adjusted) in September after falling in the previous three months. Entries from the US recorded growth of 1.4% as Americans made more same-day (+3.1%) and overnight (+0.6%) trips north of the border into BC. The US accounts for about 80% of all traveller entries into the province.

Travel to BC from overseas countries was also up (+1.1%) in September. The number of entries from Europe (+1.2%) and Oceania (+2.3%) increased enough to offset the dipping Asian entries (-0.3%).

The number of Canadian entries also climbed, as travel from both the US (+1.6%) and overseas (+3.8%) experienced growth.

Visitor entries increased

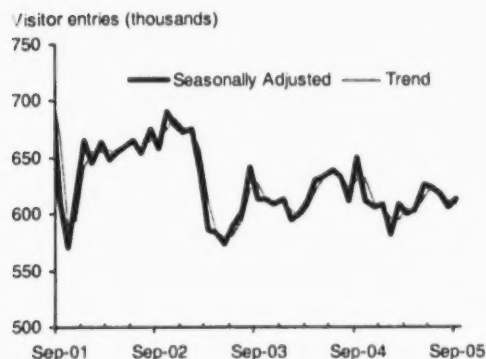


Table 2. Traveller Entries
(seasonally adjusted)

	Sep-05 (^{'000})	Aug-05 (^{'000})	% chg from Aug-05
American visitors			
Total	489	482	1.4
Same-day	198	192	3.1
Overnight	288	286	0.6
Overseas visitors			
Total	125	123	1.1
Europe	43	42	1.2
UK	21	21	-0.8
Asia	59	59	-0.3
Japan	20	21	-0.2
Taiwan	8	7	13.1
Oceania	14	13	2.3

Note: Total Overseas visitors is not equal to the sum of visitors from Europe, Asia and Oceania since it includes other areas

Other Indicators

Other tourism indicators were generally strong in September.

The occupancy rate in BC hotels was up 3.9 percentage points (to 66.5%) after falling for three consecutive months since May. Room prices also increased 0.9% to an average of \$120.

The Consumer Price Index for traveller accommodation jumped 3.9%, which was the first growth recorded since January. Passenger traffic was heavier at both Vancouver (+1.4%) and Victoria (+3.3%) airports. More passenger vehicles (+1.6%)

passed the toll booth of the Coquihalla highway. There were also more passengers (+1.4%) aboard BC Ferries, but the volume of vehicles was flat.

The cost of restaurant food continued to inch up (+0.1%) in September. Sales at drinking places (-7.8%) were significantly off, dragging down overall restaurant, caterer and tavern receipts (-1.7%).

Table 3. Other Tourism Indicators
(seasonally adjusted)

	Sep-05	Change from Aug-05
Hotel Industry		
Occupancy rate	66.5	3.0 pp.
Average room charge (Pannell Kerr Forster)	120.00	0.9%
Airport Passengers (000s) (%)		
Vancouver International Airport		
Total traffic	1,377	1.4
US (trans-border)	340	3.1
Other International	335	0.9
Canada (domestic) (YVR)	702	0.8
Victoria International Airport		
Total traffic (Victoria Airport Authority)	111	3.3
Restaurant Receipts (\$ millions) (%)		
All establishments	511	-1.7
Food service	468	-1.1
Drinking places (Statistics Canada)	43	-7.8
Transportation (000s) (%)		
Coquihalla Highway		
Passenger Vehicles (Ministry of Transportation & Highways)	223	1.6
BC Ferries		
Vehicle Volume	708	0.0
Passenger Volume (BC Ferries)	1,822	1.4
Exchange Rates Cdn \$		
US \$	0.831	0.02
UK Pound	0.463	0.01
Japanese Yen	94.429	2.60
Australian \$ (Statistics Canada)	1.110	0.02

Note: pp. percentage points

Note to readers: all data in the *Tourism Sector Monitor* are reported on a seasonally adjusted basis.

A look ahead

Room Revenue

Preliminary numbers suggest that room revenues plunged (-2.2%, seasonally adjusted) in October as seven regions lost ground. Northeast (+5.5%) was the lone exception, and continued its strong growth.

Hotel revenues slumped (-0.9%) in October, with declines recorded for hotels of all sizes. Motel receipts fell (-0.3%), and non-standard accommodations (-5.4%) including fishing lodges and bed and breakfasts performed even worse. However, vacation rentals managed to stay busy (+1.3%).

Other tourism indicators were also weak in October. Visitor entries were down (-4.0%, seasonally adjusted) with fewer visitors coming from both the US (-4.6%) and overseas (-2.0%).

Passenger traffic was up at the Vancouver airport (+0.4%), while Victoria's airport (-2.5%) was not as busy in September. BC ferries recorded declines in both vehicle (-1.9%) and passenger (-2.7%) volumes. Fewer passenger vehicles (-3.1%) travelled on the Coquihalla highway.

About preliminary numbers

Companies file their hotel room taxes with varying delays. The initial data retrieved by BC Stats may be revised considerably over the following months. BC Stats reports room revenues with a three-month lag. For example, data for January are not reported until April. However, we also briefly report "preliminary data" with a two-month lag.

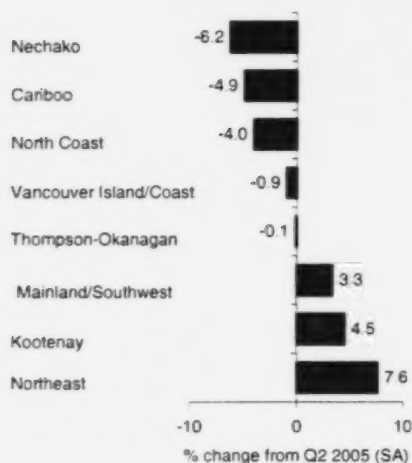
How accurate is the preliminary data? Over 17 reports in 2004 and 2005, BC room revenues changed (rose or fell on a month-over-month basis) on average by 1.7% (absolute value). The preliminary numbers—reported in the "look ahead" section—were less by an average of 0.2 percentage points partly because the initial data retrieved may not be complete until later that month. For example, if the preliminary figure is 1.5, the actual number probably is around 1.7. And if the preliminary figure is -0.5, the actual number is about -0.3.

Third Quarter Review of BC's Tourism Sector

Room Revenues continued to climb

Room revenues rose (+1.8%, *seasonally adjusted*) in the third quarter, posting the ninth consecutive quarterly gain. Northeast recorded the strongest growth of 7.6%, regaining its ground from a weak second quarter. Kootenay continued to experience solid growth (+4.5%) in the third quarter. Revenues also advanced 3.3% in BC's largest region, Mainland/Southwest. The revenue increases were large enough to offset the declines recorded in the rest of BC. Revenues slumped in Cariboo (-4.9%) and North Coast (-4.0%) after increasing in the previous quarter, while Vancouver Island/Coast, Thompson-Okanagan, and Nechako continued to trend downward trends.

Revenues jumped in Caribo and North Coast

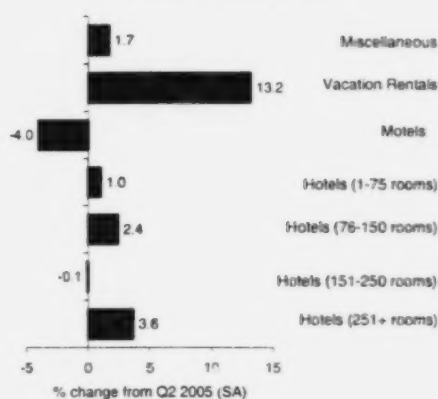


Data source: BC Stats

In the third quarter, revenues reached a new high of \$422 million, with an increase for most accommodation types. Very large (251+ rooms, +3.6%), midsize (76-150 rooms, +2.4%) and small (1-76 rooms, +1.0) hotels continued to do well, while revenues at hotels with 151-250 rooms edged down (-0.1%). Business at vacation rentals (+13.2%) bounced back after

experiencing declines since the beginning of the year. Other types of accommodations, including bed and breakfasts, fishing lodges and other kinds of short-term accommodations, saw room revenues grow 1.3%. However, motels (-4.0%) had a weak quarter.

Vacation rentals posted the strongest growth



a source: BC Stats

Data

Visitor entries rose in the third quarter

Visitor entries to Canada through BC border crossings slipped in the third quarter (-0.2%, *seasonally adjusted*), largely due to the decline in the number of American visitors (-0.5%), as fewer same-day (-1.9%) and overnight stays (-0.8%) were recorded.

Travel from Overseas countries was also down (-2.3%) in the third quarter. Asian entries, which comprise about half of the total overseas markets, were down significantly (-5.5%).

The number of Canadians re-entering the country via BC border crossings climbed 4.5% after falling last quarter. More Canadians made same-day auto trips to the US (+7.4%) or travelled overseas (+1.6%).

Other Indicators

Hotel occupancy rates averaged 64.7% (seasonally adjusted) in the second quarter, increasing 0.4%. Average room rates, at \$117.9, were up 1.1% compared with the second quarter.

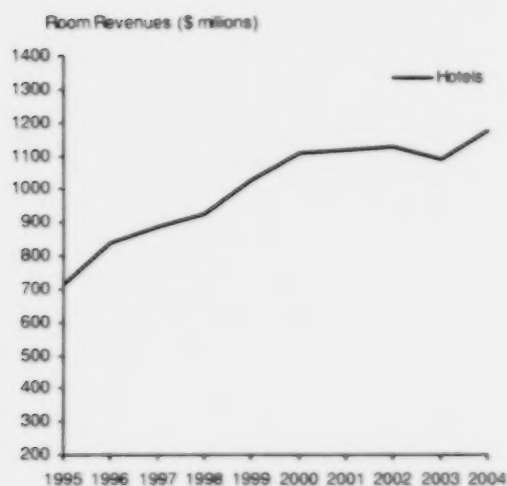
Air passenger traffic at Vancouver airport slumped (-0.5%), and Victoria (-1.4%) experienced lower volumes on all types of flights. BC Ferries carried fewer passengers (-1.8%) and vehicles (-1.6%).

Employment in the major tourism-related industries was up (+0.6%) in the third quarter of 2005. Restaurant, caterer and tavern receipts edged up (+0.2%), as an increase in revenues at food service establishments (+0.3%) offset lower receipts at drinking places (-0.4%).

Special Focus: Room Revenues at BC Hotels

BC's hotel industry is the biggest source of the province's room revenue growth—nearly 75% of revenues originate from hotels. After seeing only marginal growth in room revenues between 2000 and 2002, and a decline of 3.1% in 2003, BC's hotel industry picked up speed and contributed more than \$1.1 billion to the province's total room revenues in 2004, up 7.6% over 2003.

Room revenues picking up speed at hotels in 2004



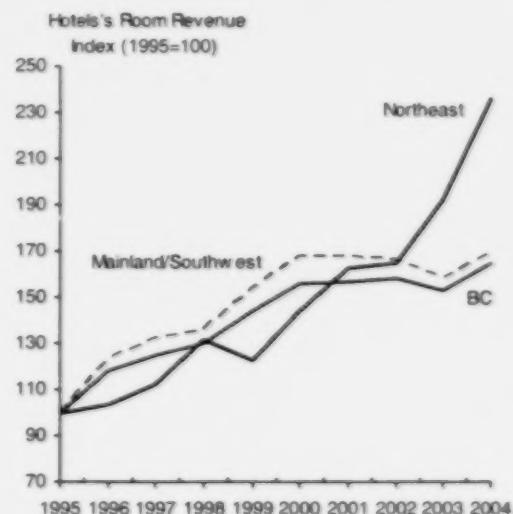
Source: BC STATS

Although hotels' share of the total room revenues went down from 75.1% in 1995 to 73.7% in 2004, room revenues at all hotel establishments jumped sharply (+64.9%) between 1995 and 2004, and continued an upward trend in the first eight months of 2005, posting a 3.3% growth relative to the same period in the previous year.

Growth reported at hotel establishments in most regions

All regions in BC except Nechako (-5.0%) reported growth in overall room revenues at hotel establishments between 1995 and 2004, with Northeast recording the largest growth (+135.8%). The solid revenue increases at hotels in the two largest regions, Mainland/Southwest (+69.5%) and Vancouver Island/Coast (+46.5%), accounted for about 70% of the BC's total hotel growth.

Room revenues growing faster at Hotels in Northeast than the rest of the province

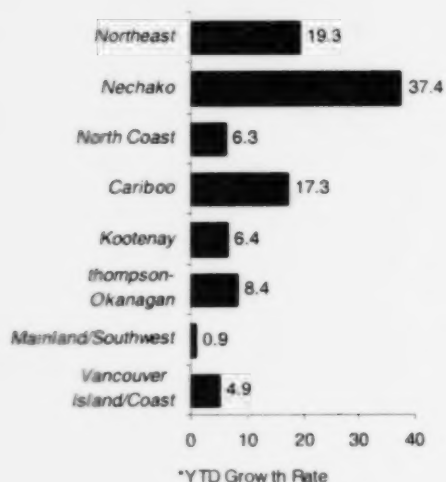


Source: BC STATS

In the first eight months of 2005, most regions maintained solid growth in room revenues at hotels compared to the same period in 2004. Nechako posted the most significant increase of 37.4%, and showed a strong recovery from the year-over-year fall (-4.2%) in hotel receipts in 2004. Hotels in Northeast (+19.3%) and Cariboo (+17.3%) fared well too. In addition, BC's biggest regions, Mainland/Southwest (+0.9%) and

Vancouver Island/Coast (+4.9%), were busier and contributed to the overall increases in the province's hotel room revenues.

Nechako posting strongest growth in revenues at hotels in the first eight months in 2005



*YTD: year-to-date indicates the growth year in the first eight months of 2005 compared to the same period in 2004

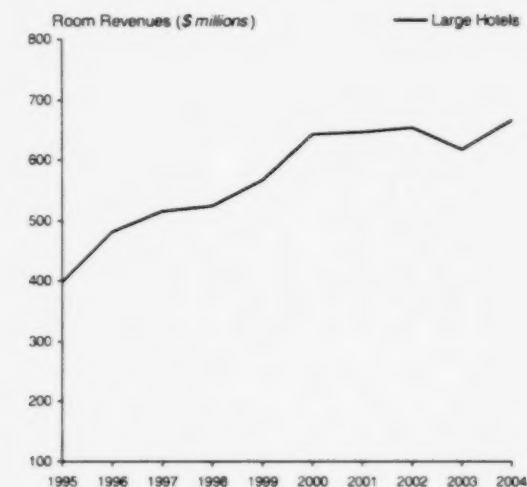
Data Source: BC STATS

Large Hotels

Room revenues at hotels with more than 150 rooms comprised about 55% of the total hotel receipts, and recorded noticeable growth since 1995—room revenues were up 67.4% between 1995 and 2004. In 2004, revenues increased 7.7% at large hotels, recovering from a fall (-5.4%) in 2003.

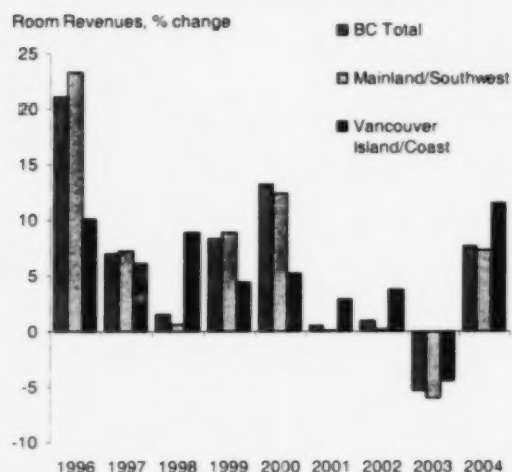
Most of the large hotel establishments (150+ rooms) are located in the Vancouver Island/Coast and Mainland/Southwest regions. Large hotels in the Vancouver Island/Coast region recorded an 11.5% increase in revenues, outperforming BC (+7.7%) as a whole and Mainland/Southwest (+7.3%).

In 2004, large Hotel establishments recovered from the 2003 fall in room revenues



Data Source: BC STATS

Large hotels in Vancouver Island/Coast outperformed the rest of BC in 2004

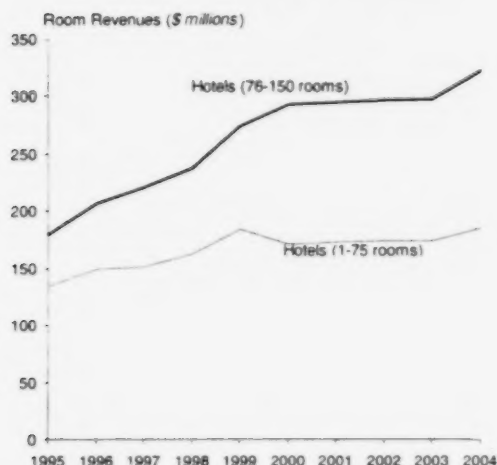


Data Source: BC STATS

Other Hotel Establishments

Despite the drops in room revenues at most hotel establishments in 2003, mid-size hotels (76-150 rooms) did not follow the same trend. Business at those hotels appeared to be lacklustre between 2000 and 2003; however, room revenues climbed 8.2% in 2004 and continued to grow 5.6% in the first eight months in 2005 relative to the same period in 2004.

Mid-size hotels vs. Small hotels



Data Source: BC STATS

Among all hotel establishments, small hotels with less than 75 rooms reported the weakest increase (+6.6%) in room revenues in 2004. In fact, business at small hotels showed the least significant growth of 38.0% between 1995 and 2004. However, in the first eight months of 2005, room revenues at small hotels recorded the largest growth (+8.3%) among all hotel establishments relative to the same period in 2004.

Table 1: Room Revenue by Development Region (\$000), Seasonally Adjusted

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	BC Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,245	863,420	229,551	76,957	46,198	20,104	8,811	51,889	1,592,176

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.6	7.3	3.8	-1.3	12.2	7.1

Monthly data

Sep-04	25,158	71,816	19,257	6,404	3,829	1,668	778	4,291	133,202
Oct-04	24,719	71,046	19,150	6,249	3,914	1,704	740	5,252	132,775
Nov-04	25,217	71,409	19,961	6,507	3,952	1,742	765	5,208	134,761
Dec-04	26,273	74,373	20,275	6,327	4,737	1,529	788	4,819	139,120
Jan-05	25,968	71,169	20,206	6,274	3,839	1,627	837	5,006	134,926
Feb-05	25,532	70,834	20,849	6,219	4,230	1,701	1,012	6,062	136,438
Mar-05	26,644	70,204	21,225	6,162	4,177	1,739	1,007	4,752	135,911
Apr-05	25,953	70,892	20,807	6,404	4,721	1,674	904	3,770	135,126
May-05	25,999	73,921	21,036	6,603	4,360	2,009	906	5,087	139,921
Jun-05	25,728	75,364	20,345	6,557	4,216	1,778	772	5,205	139,965
Jul-05	25,577	74,092	20,620	6,830	4,391	1,761	798	5,016	139,085
Aug-05	25,620	75,210	20,612	6,735	4,027	1,754	801	4,757	139,517
Sep-05	25,772	78,169	20,892	6,873	4,228	1,728	822	5,362	143,846

Month-over-month growth rates

Sep-04	2.5	0.4	3.1	3.1	-1.9	-2.6	5.9	2.4	1.3
Oct-04	-1.7	-1.1	-0.6	-2.4	2.2	2.2	-5.0	22.4	-0.3
Nov-04	2.0	0.5	4.2	4.1	1.0	2.2	3.4	-0.8	1.5
Dec-04	4.2	4.2	1.6	-2.8	19.9	-12.2	2.9	-7.5	3.2
Jan-05	-1.2	-4.3	-0.3	-0.8	-19.0	6.4	6.3	3.9	-3.0
Feb-05	-1.7	-0.5	3.2	-0.9	10.2	4.5	20.9	21.1	1.1
Mar-05	4.4	-0.9	1.8	-0.9	-1.3	2.2	-0.4	-21.6	-0.4
Apr-05	-2.6	1.0	-2.0	3.9	13.0	-3.7	-10.2	-20.7	-0.6
May-05	0.2	4.3	1.1	3.1	-7.6	20.0	0.2	34.9	3.5
Jun-05	-1.0	2.0	-3.3	-0.7	-3.3	-11.5	-14.7	2.3	0.0
Jul-05	-0.6	-1.7	1.3	4.2	4.1	-0.9	3.4	-3.6	-0.6
Aug-05	0.2	1.5	0.0	-1.4	-8.3	-0.4	0.3	-5.2	0.3
Sep-05	0.6	3.9	1.4	2.0	5.0	-1.5	2.7	12.7	3.1

September month-over-month percent growth

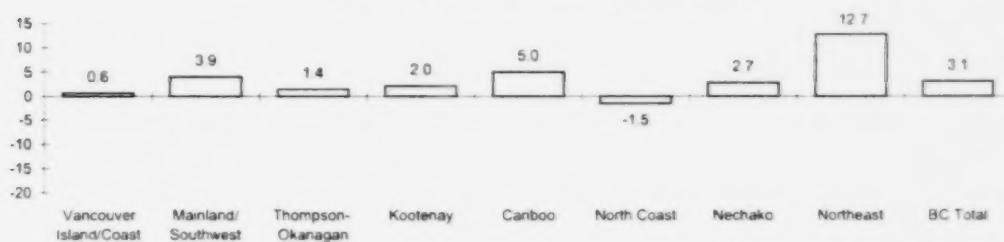


Table 2: Room Revenue by Accommodation Type (\$000), Seasonally Adjusted

Period	Hotels (Rooms)				Motels	Vacation Rentals	Miscellaneous Incl. Fishing Lodges
	251+	151-250	76-150	1-75			

Annual data

2000	442,226	201,392	293,035	171,584	174,917	94,829	64,103
2001	449,803	197,535	294,441	172,927	176,402	107,193	75,682
2002	465,543	188,385	297,026	174,173	181,785	112,442	86,833
2003	437,892	180,831	297,403	174,263	181,383	119,487	95,423
2004	467,820	198,608	321,679	185,673	195,057	124,438	98,902

Annual growth rates

2000	14.6	10.5	6.8	-6.8	2.9	28.0	9.7
2001	1.7	-1.9	0.5	0.8	0.8	13.0	18.1
2002	3.5	-4.6	0.9	0.7	3.1	4.9	14.7
2003	-5.9	-4.0	0.1	0.1	-0.2	6.3	9.9
2004	6.8	9.8	8.2	6.5	7.5	4.1	3.6

Monthly data

Sep-04	39,733	16,901	26,745	15,796	16,339	10,526	8,684
Oct-04	37,345	16,630	26,968	15,992	16,421	11,290	8,306
Nov-04	37,614	17,836	28,102	15,755	17,701	11,090	8,511
Dec-04	42,811	17,330	27,222	15,623	17,202	11,234	8,498
Jan-05	39,058	16,641	27,209	15,016	16,577	11,263	8,133
Feb-05	38,687	17,037	27,692	15,941	17,363	10,791	8,333
Mar-05	38,640	17,031	27,868	16,712	17,793	10,292	8,245
Apr-05	35,950	17,634	27,797	16,580	17,972	8,256	7,700
May-05	39,605	17,744	28,701	17,393	18,044	10,411	9,362
Jun-05	39,873	17,466	28,774	17,280	17,247	11,178	8,623
Jul-05	39,037	17,448	28,918	17,100	17,516	11,108	8,562
Aug-05	39,911	17,409	29,041	16,984	16,661	11,114	8,613
Sep-05	40,681	17,943	29,367	17,684	16,939	11,554	8,939

Month-over-month growth rates

Sep-04	3.3	2.8	0.7	2.3	3.6	0.8	4.6
Oct-04	-6.0	-1.6	0.8	1.2	0.5	7.3	-4.3
Nov-04	0.7	7.3	4.2	-1.5	7.8	-1.8	2.5
Dec-04	13.8	-2.8	-3.1	-0.8	-2.8	1.3	-0.1
Jan-05	-8.8	-4.0	0.0	-3.9	-3.6	0.3	-4.3
Feb-05	-1.0	2.4	1.8	6.2	4.7	-4.2	2.5
Mar-05	-0.1	0.0	0.6	4.8	2.5	-4.6	-1.1
Apr-05	-7.0	3.5	-0.3	-0.8	1.0	-19.8	-6.6
May-05	10.2	0.6	3.3	4.9	0.4	26.1	21.6
Jun-05	0.7	-1.6	0.3	-0.6	-4.4	7.4	-7.9
Jul-05	-2.1	-0.1	0.5	-1.0	1.6	-0.6	-0.7
Aug-05	2.2	-0.2	0.4	-0.7	-4.9	0.1	0.6
Sep-05	1.9	3.1	1.1	4.1	1.7	4.0	3.8

September month-over-month percent growth

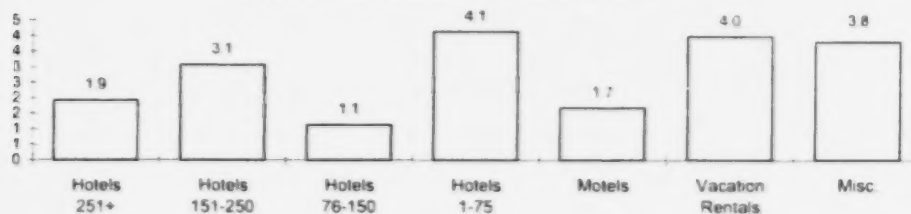


Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Sep-05	YTD 05	Sep-04	YTD 04	Sep-05	Sep-04	Sep-05	Sep-04
Vancouver Island/Coast								
17 Capital								
Total - All accommodation types	20,279	146,319	1.0	4.5	193	0	8,573	63
Total - Hotels	16,867	120,206	3.9	5.4	70	1	5,650	54
76+ Rooms	12,939	91,530	3.8	4.5	26	0	3,937	0
1-75 Rooms	3,928	28,676	4.2	8.3	44	1	1,713	54
Motels	1,372	12,304	-21.0	1.9	28	-1	1,136	49
Vacation Rentals	461	4,463	-6.7	0.5	29	0	317	-56
19 Cowichan Valley								
Total - All accommodation types	933	7,581	3.7	9.9	38	1	676	14
Motels	185	1,877	-8.3	19.5	17	1	331	15
21 Nanaimo								
Total - All accommodation types	4,225	34,281	5.3	7.9	74	-6	2,576	-135
Total - Hotels	2,181	16,988	8.4	7.8	19	-2	1,196	-90
Motels	895	6,896	-4.6	4.5	26	-1	651	-26
Vacation Rentals	974	8,712	10.4	10.5	19	-2	576	-15
23 Alberni-Clayoquot								
Total - All accommodation types	4,975	35,697	1.1	9.2	72	2	1,550	31
Total - Hotels	1,206	8,584	-1.8	3.2	12	-1	432	-1
Motels	531	3,682	-1.3	6.9	21	1	420	15
Vacation Rentals	1,814	13,527	0.8	18.3	17	0	354	7
25 Comox-Strathcona								
Total - All accommodation types	3,764	26,370	4.0	1.4	91	-3	2,243	28
Fishing lodges	883	5,230	6.2	2.5	21	-3	397	-17
Motels	870	6,042	0.1	-1.2	25	-1	697	0
Vacation Rentals	386	3,196	-14.8	-3.5	24	-1	279	-1
27 Powell River								
Total - All accommodation types	648	3,396	30.3	-10.4	22	3	424	66
43 Mount Waddington								
Total - All accommodation types	999	5,061	22.3	6.1	27	-1	594	-123
45 Central Coast								
Total - All accommodation types	458	1,824	33.2	5.9	13	0	173	-1
Mainland/Southwest								
09 Fraser Valley								
Total - All accommodation types	4,626	32,278	8.0	5.8	74	4	2,520	16
Total - Hotels	3,385	23,142	11.3	7.2	18	-2	1,349	-31
Motels	877	6,855	-5.1	6.4	39	1	975	13
15 Greater Vancouver								
Total - All accommodation types	76,523	545,006	10.2	5.0	248	2	26,228	279
Total - Hotels	72,279	508,704	9.9	4.2	164	2	23,163	-197
251+ Rooms	37,692	268,162	6.1	0.0	24	-1	9,472	-484
151-250 Rooms	13,728	98,469	7.8	6.6	26	1	4,952	200
76-150 Rooms	14,962	104,228	16.2	9.8	54	0	5,831	-18
1-75 Rooms	5,897	37,845	26.9	15.3	60	2	2,908	105
Motels	2,161	15,684	11.3	10.8	36	-1	1,574	-43
Vacation Rentals	901	9,551	-8.9	39.0	21	1	667	103
29 Sunshine Coast								
Total - All accommodation types	585	4,050	18.0	12.9	23	-1	403	-3
31 Squamish-Lillooet								
Total - All accommodation types	8,401	134,384	10.1	-9.1	101	-2	7,315	-187
Total - Hotels	7,339	110,242	11.8	-8.1	45	-2	5,475	-300
1-75 Rooms	526	7,940	-22.1	-22.0	18	-3	660	-167
Vacation Rentals	608	16,881	8.0	-11.7	31	1	1,266	26
Miscellaneous	278	5,895	-11.5	-18.5	18	-1	405	87
Thompson/Okanagan								
07 Okanagan-Similkameen								
Total - All accommodation types	4,524	38,536	10.0	8.7	118	0	3,207	11
Total - Hotels	2,272	18,030	12.7	6.1	15	-1	1,074	11
Motels	1,777	16,065	5.6	8.0	73	-2	1,724	-50

Table 3: Unadjusted Room Revenue by Regional District

Development Region/ Regional District	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Sep-05	YTD 05	Sep-04	YTD 04	Sep-05	Sep-04	Sep-05	Sep-04
33 Thompson-Nicola								
Total - All accommodation types	6,828	55,324	11.3	4.6	172	2	5,688	94
Total - Hotels	3,039	24,995	4.2	3.9	35	0	2,232	11
76+ Rooms	2,310	19,776	0.4	3.6	12	0	1,388	-1
1-75 Rooms	729	5,219	18.3	5.1	23	0	844	12
Motels	2,590	17,384	21.1	5.6	81	1	2,377	36
Vacation Rentals	342	7,443	34.7	2.8	21	2	523	66
35 Central Okanagan								
Total - All accommodation types	7,712	62,956	3.2	9.9	63	-7	3,179	-181
Total - Hotels	5,269	41,300	2.0	10.8	19	1	1,710	4
Motels	1,499	11,705	-9.3	-0.4	25	-5	1,067	-122
Vacation Rentals	391	7,617	-0.7	23.0	15	-3	234	-63
37 North Okanagan								
Total - All accommodation types	1,705	17,871	8.7	13.8	44	-5	1,426	-93
Motels	729	5,845	5.7	14.8	18	-1	578	-66
39 Columbia-Shuswap								
Total - All accommodation types	4,504	36,250	4.4	9.7	111	1	3,374	60
Total - Hotels	2,011	15,082	3.3	5.5	20	1	1,250	18
Motels	1,758	12,762	0.9	6.5	49	-1	1,516	-15
Kootenay								
01 East Kootenay								
Total - All accommodation types	4,942	43,879	2.5	-1.7	116	0	4,515	-64
Total - Hotels	1,566	14,397	14.2	6.9	24	0	1,316	-91
Motels	1,413	9,771	-3.9	2.6	50	-1	1,212	-6
Vacation Rentals	771	9,150	31.2	-8.5	16	0	952	18
03 Central Kootenay								
Total - All accommodation types	2,588	16,643	20.4	9.1	88	2	1,652	-11
Total - Hotels	1,381	8,952	14.3	9.0	19	-1	778	-18
Motels	731	4,243	21.6	10.2	34	1	560	0
Vacation Rentals	275	1,544	48.1	21.1	18	-1	137	-4
05 Kootenay Boundary								
Total - All accommodation types	663	5,429	4.8	8.7	41	3	762	59
Motels	440	2,885	-4.7	1.8	25	2	434	37
Cariboo								
41 Cariboo								
Total - All accommodation types	2,273	15,344	5.8	8.0	112	-5	2,146	-90
Fishing lodges	183	726	20.1	6.0	18	2	171	14
Motels	1,047	7,862	5.5	10.9	35	-1	977	-55
Vacation Rentals	188	1,007	35.3	-2.2	33	-4	322	-30
53 Fraser-Fort George								
Total - All accommodation types	3,490	26,018	13.1	16.5	61	0	2,589	22
Total - Hotels	2,412	18,419	15.9	19.6	20	1	1,496	82
Motels	958	6,685	6.8	11.0	29	-1	971	-24
North Coast								
47 Skeena-Queen Charlotte								
Total - All accommodation types	1,388	10,908	-2.4	2.0	40	0	1,139	14
Motels	303	2,003	9.4	-0.0	11	0	328	0
49 Kitimat-Stikine								
Total - All accommodation types	1,013	7,009	11.2	7.5	39	-2	870	-23
Motels	368	2,511	13.8	9.0	17	0	401	0
Nechako								
51 Bulkley-Nechako + 57 Stikine								
Total - All accommodation types	1,210	8,003	3.2	16.2	56	-7	1,188	-74
Motels	661	4,331	3.2	12.9	24	-3	669	-33
Northeast								
55 Peace River + 59 Northern Rockies								
Total - All accommodation types	5,072	47,696	24.5	23.6	67	-5	3,131	-466
Total - Hotels	2,649	22,531	24.5	19.9	23	-1	1,579	-10
Motels	1,575	11,167	28.8	21.3	33	1	904	8

.. Data for regions with fewer than 10 properties reporting can not be released

Table 4: Unadjusted Room Revenue by Urban Centre

Development Region/ Urban Centre	Revenue				Properties		Rooms	
	(\$000)		% change from		(#)	# chg from	(#)	# chg from
	Sep-05	YTD 05	Sep-04	YTD 04	Sep-05	Sep-04	Sep-05	Sep-04
Vancouver Island/Coast	36,280	260,530	3.1	5.2	530	-4	16,809	-57
Victoria (C)	16,616	117,242	4.5	5.7	93	4	5,870	210
Other CRD	2,721	22,148	-19.4	-6.4	89	-4	2,351	-167
Nanaimo (C)	2,229	17,613	6.7	10.9	23	-1	1,225	-29
Port Alberni (C)	510	3,430	-4.6	8.5	15	0	405	10
Courtenay (C)	898	7,005	8.2	7.4	13	2	510	25
Rest of Development Region	13,306	93,091	6.9	6.4	310	-3	6,448	-106
Mainland/Southwest	90,135	715,719	10.1	2.1	446	3	36,466	105
Downtown Vancouver (C)	49,923	343,335	8.4	2.2	86	2	12,774	-71
Other Vancouver (C)	4,899	34,201	23.2	28.9	37	-1	2,868	181
Richmond (C)	11,561	85,614	15.0	9.6	27	1	4,542	200
Burnaby (C)	2,614	20,656	-3.1	-3.8	12	1	1,379	114
Other GVRD	7,526	61,200	12.5	8.1	86	-1	4,665	-195
Whistler (DM)	7,724	128,274	10.2	-9.9	75	-4	6,603	-332
Rest of Development Region	5,887	42,438	8.9	7.4	123	5	3,635	208
Thompson/Okanagan	25,273	210,936	7.1	8.5	508	-9	16,874	-109
Penticton (C)	2,439	21,661	3.1	4.8	46	-4	1,694	-53
Kamloops (C)	4,740	40,925	9.3	2.1	71	-2	3,700	4
Kelowna (C)	6,654	56,452	0.3	11.1	47	-6	2,684	-102
Vernon (C)	1,583	16,604	9.3	14.6	28	-1	1,251	-63
Revelstoke (C)	1,442	12,698	1.4	3.3	33	2	1,276	11
Rest of Development Region	8,415	62,596	13.9	11.6	283	2	6,269	94
Kootenay	8,194	65,951	7.8	1.7	245	5	6,929	-16
Cranbrook (C)	920	6,838	-6.8	4.9	17	-2	798	-121
Nelson (C)	860	5,520	20.4	4.2	12	0	425	0
Rest of Development Region	6,413	53,594	8.7	1.0	228	7	6,131	105
Cariboo	5,764	41,362	10.1	13.2	173	-5	4,735	-68
Quesnel (C)	376	3,010	9.4	7.4	13	0	467	15
Williams Lake (C)	557	4,252	0.6	11.5	11	-1	519	-55
Prince George (C)	2,493	19,099	11.9	17.3	32	0	1,810	22
Rest of Development Region	2,337	15,001	10.9	9.9	117	-4	1,939	-50
North Coast	2,400	17,917	2.9	4.1	79	-2	2,009	-9
Prince Rupert (C)	1,047	6,074	6.1	1.1	17	0	780	0
Terrace (C)	522	3,972	13.6	8.4	13	0	426	3
Rest of Development Region	830	7,871	-6.2	4.4	49	-2	803	-12
Nechako	1,210	8,003	3.2	16.2	56	-7	1,188	-74
Smithers (T)	626	4,082	3.1	23.2	18	0	458	4
Rest of Development Region	584	3,921	3.4	9.8	38	-7	730	276
Northeast	5,072	47,696	24.5	23.6	67	-5	3,131	-466
Dawson Creek (C)	816	6,598	35.0	31.7	13	0	471	-15
Fort St. John (C)	1,761	20,442	27.2	30.2	16	-3	981	-596
Rest of Development Region	2,495	20,657	19.6	15.4	38	-2	1,679	145

"-" Data for regions with fewer than 10 properties reporting can not be released.

Table 5: Historical Unadjusted Room Revenue by Development Region (\$000)

Period	Vancouver Island/Coast	Mainland Southwest	Thompson Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
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Annual data

2000	245,309	846,849	183,893	63,793	43,571	20,609	8,443	29,617	1,442,085
2001	258,235	854,936	190,350	64,108	42,553	19,342	8,807	35,653	1,473,983
2002	268,454	850,333	205,411	71,712	44,514	19,016	8,843	37,904	1,506,188
2003	272,990	810,455	213,447	72,167	43,064	19,364	8,929	46,266	1,486,681
2004	295,244	863,420	229,533	76,892	46,181	20,127	8,811	51,889	1,592,097

Annual growth rates

2000	2.9	8.8	10.2	19.0	6.8	10.5	-2.8	22.5	8.5
2001	5.3	1.0	3.5	0.5	-2.3	-6.2	4.3	20.4	2.2
2002	4.0	-0.5	7.9	11.9	4.6	-1.7	0.4	6.3	2.2
2003	1.7	-4.7	3.9	0.6	-3.3	1.8	1.0	22.1	-1.3
2004	8.2	6.5	7.5	6.5	7.2	3.9	-1.3	12.2	7.1

Monthly data

Sep-04	35,179	81,870	23,602	7,603	5,234	2,334	1,172	4,075	161,067
Oct-04	20,981	55,010	13,961	4,252	3,996	1,251	886	5,132	105,468
Nov-04	13,405	43,212	8,484	2,886	2,856	959	570	4,183	76,555
Dec-04	13,224	64,448	12,659	4,875	2,804	685	469	3,971	103,134
Jan-05	11,247	61,240	13,166	5,699	2,447	728	486	5,918	100,931
Feb-05	14,475	68,394	16,512	7,347	2,830	1,025	666	9,234	120,483
Mar-05	19,694	72,549	19,344	7,273	3,540	1,141	841	7,407	131,790
Apr-05	21,271	60,174	13,445	4,837	4,213	1,011	642	3,458	109,052
May-05	27,664	73,344	19,759	5,298	4,614	1,893	826	3,206	136,604
Jun-05	33,180	85,145	23,822	6,041	5,245	2,918	1,004	4,150	161,504
Jul-05	45,569	98,207	39,438	10,431	6,416	3,468	1,094	4,709	209,330
Aug-05	51,149	106,532	40,177	10,832	6,294	3,332	1,235	4,542	224,092
Sep-05	36,280	90,135	25,273	8,194	5,764	2,400	1,210	5,072	174,327

Year-over-year percent changes

Sep-04	11.8	12.8	17.9	14.1	9.6	-0.2	7.4	15.2	13.1
Oct-04	5.4	5.2	1.2	0.2	5.9	3.7	-8.0	48.5	5.9
Nov-04	5.1	4.3	5.5	16.2	8.9	6.2	5.9	41.0	6.7
Dec-04	12.4	8.6	8.6	-3.0	27.5	-17.5	3.4	4.4	8.5
Jan-05	3.3	2.9	5.1	-3.0	7.5	-8.0	17.1	33.7	4.4
Feb-05	2.5	-0.1	9.5	-10.2	15.5	-0.7	45.0	46.0	3.8
Mar-05	13.9	-2.4	22.5	-6.4	9.8	9.8	65.8	12.8	4.1
Apr-05	9.1	-5.2	5.9	-3.3	30.7	-4.3	17.8	-5.5	-0.1
May-05	8.0	2.5	9.5	11.3	20.4	25.9	26.6	33.7	6.4
Jun-05	5.7	4.3	8.5	2.1	11.6	4.7	2.0	28.4	5.9
Jul-05	3.0	0.1	4.9	8.1	17.1	1.0	4.0	20.9	2.9
Aug-05	3.5	4.6	8.3	7.0	3.0	2.4	12.2	12.7	5.2
Sep-05	3.1	10.1	7.1	7.8	10.1	2.9	3.2	24.5	8.2

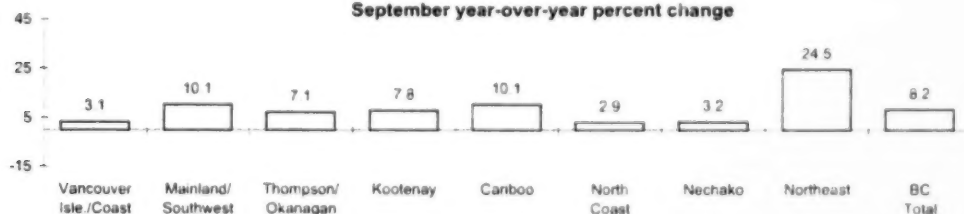
September year-over-year percent change


Table 6: Traveller Entries to Canada via BC, Seasonally Adjusted (000s)

Period	International							
	Total	USA			Overseas			
		Total*	Same-day	Overnight	Total	Asia	Europe	Oceania**

Annual data

2000	8,481.7	7,006.0	3,407.1	3,598.8	1,475.8	758.9	498.0	133.8
2001	8,312.5	6,894.5	3,257.7	3,636.8	1,418.0	731.8	466.3	131.9
2002	7,970.8	6,595.9	2,808.1	3,787.8	1,374.9	764.0	411.3	118.0
2003	7,335.3	6,137.4	2,580.7	3,556.7	1,197.8	577.6	410.1	124.8
2004	7,427.8	6,022.5	2,477.6	3,561.5	1,405.3	715.8	458.1	144.3

Annual percent changes

2000	2.6	2.1	1.1	3.1	4.8	6.0	2.8	6.2
2001	-2.0	-1.6	-4.4	1.1	-3.9	-3.6	-6.4	-1.4
2002	-4.1	-4.3	-13.8	4.2	-3.0	4.4	-11.7	-10.5
2003	-8.0	-7.0	-8.1	-6.1	-12.9	-24.4	-0.4	5.8
2004	1.3	-1.9	-4.0	0.1	17.3	23.9	11.7	15.6

Monthly data

Oct-04	611.8	493.2	206.5	297.2	118.6	58.1	40.2	12.0
Nov-04	605.9	493.3	203.7	296.7	112.6	56.5	36.2	12.1
Dec-04	609.0	492.9	201.0	292.4	116.1	55.9	39.4	12.2
Jan-05	581.8	465.5	180.0	290.2	116.3	54.9	40.6	12.4
Feb-05	608.9	486.9	198.2	291.4	122.0	61.3	40.6	12.6
Mar-05	600.2	478.3	194.8	284.7	121.9	62.9	42.1	12.3
Apr-05	603.1	476.9	191.2	286.6	126.3	64.6	42.1	12.0
May-05	625.8	496.9	200.7	296.7	129.0	63.6	42.8	15.3
Jun-05	622.6	494.3	204.7	290.0	128.3	63.8	42.1	14.1
Jul-05	616.7	489.8	196.1	291.8	126.8	63.2	42.3	13.9
Aug-05	605.5	482.2	191.6	286.5	123.3	59.2	42.3	13.2
Sep-05	613.4	488.8	197.5	288.3	124.7	59.0	42.8	13.5
Oct-05	588.7	466.5	189.2	278.5	122.2	58.1	41.4	12.5

Month-over-month growth rates

Oct-04	-5.8	-6.9	3.3	-0.5	-1.1	-0.3	0.5	-2.8
Nov-04	-1.0	0.0	-1.3	-0.2	-5.1	-2.9	-9.9	0.9
Dec-04	0.5	-0.1	-1.3	-1.4	3.1	-0.9	8.8	0.7
Jan-05	-4.5	-5.6	-10.5	-0.7	0.1	-1.8	2.9	1.5
Feb-05	4.7	4.6	10.1	0.4	4.9	11.5	0.1	1.6
Mar-05	-1.4	-1.8	-1.7	-2.3	-0.1	2.8	3.7	-2.2
Apr-05	0.5	-0.3	-1.8	0.6	3.6	2.7	-0.1	-2.8
May-05	3.8	4.2	5.0	3.5	2.1	-1.5	1.7	27.8
Jun-05	-0.5	-0.5	2.0	-2.3	-0.5	0.3	-1.5	-8.2
Jul-05	-1.0	-0.9	-4.2	0.7	-1.2	-0.9	0.4	-1.4
Aug-05	-1.8	-1.6	-2.2	-1.8	-2.8	-6.4	0.0	-4.6
Sep-05	1.3	1.4	3.1	0.6	1.1	-0.3	1.2	2.3
Oct-05	-4.0	-4.6	-4.2	-3.4	-2.0	-1.6	-3.2	-7.9

* Seasonally adjusted totals for US and overseas entries are calculated by Statistics Canada, and are adjusted to sum to national totals. Therefore, same-day plus overnight entries via BC will not necessarily equal the total.

** Australia, New Zealand, and other South Pacific nations

SOURCE: BC STATS, Statistics Canada

Table 7: Transportation Indicators, Seasonally Adjusted

Period	Air Passenger Traffic (000s)				Other Transportation (000s)			
	Vancouver				Victoria Total	BC Ferries		Coquihalla Hwy Passenger Vehicles
	Total	Domestic	Trans- border	Other Int'l.		Vehicles	Passengers	

Annual data

2000	16,033	8,306	4,074	3,652	1,139	7,887	21,280	2,400
2001	15,477	7,868	4,001	3,608	1,158	8,104	21,309	2,461
2002	14,877	7,422	3,855	3,600	1,102	8,272	21,540	2,530
2003	14,322	7,266	3,815	3,241	1,183	8,263	21,348	2,480
2004	15,725	7,986	3,964	3,776	1,250	8,532	21,955	2,586

Annual growth rates

2000	1.4	-0.1	-1.1	8.3	-4.4	0.4	-0.4	0.5
2001	-3.5	-5.3	-1.8	-1.2	1.7	2.8	0.1	2.5
2002	-3.9	-5.7	-3.6	-0.2	-4.9	2.1	1.1	2.8
2003	-3.7	-2.1	-1.1	-10.0	7.3	-0.1	-0.9	-2.0
2004	9.8	9.9	3.9	16.5	5.6	3.3	2.8	4.3

Monthly data

Oct-04	1,328	680	332	317	105	723	1,869	218
Nov-04	1,340	684	339	317	105	727	1,866	221
Dec-04	1,348	694	337	318	108	748	1,893	216
Jan-05	1,378	720	343	316	109	681	1,725	206
Feb-05	1,360	705	331	324	111	726	1,859	228
Mar-05	1,374	699	348	327	112	722	1,842	224
Apr-05	1,363	683	341	339	110	720	1,832	221
May-05	1,392	692	350	349	109	722	1,857	228
Jun-05	1,376	704	331	341	110	714	1,818	223
Jul-05	1,375	700	332	344	107	706	1,791	222
Aug-05	1,358	697	330	332	107	708	1,796	219
Sep-05	1,377	702	340	335	111	708	1,822	223
Oct-05	1,382	693	356	333	108	695	1,772	216

Month-over-month growth rates

Oct-04	-1.3	-0.6	-2.5	-1.4	-3.3	1.4	1.9	-1.8
Nov-04	0.8	0.6	2.2	0.0	0.6	0.6	-0.2	1.6
Dec-04	0.6	1.5	-0.7	0.3	2.2	2.9	1.5	-2.3
Jan-05	2.3	3.8	1.8	-0.6	0.9	-9.0	-8.9	-4.6
Feb-05	-1.4	-2.1	-3.5	2.6	1.8	6.6	7.7	10.3
Mar-05	1.1	-0.8	5.1	1.0	1.7	-0.5	-0.9	-1.6
Apr-05	-0.8	-2.3	-2.0	3.7	-2.3	-0.4	-0.5	-1.3
May-05	2.1	1.3	2.8	2.9	-0.7	0.4	1.4	3.1
Jun-05	-1.1	1.7	-5.6	-2.3	1.1	-1.1	-2.1	-2.0
Jul-05	0.0	-0.6	0.5	0.7	-3.3	-1.2	-1.5	-0.6
Aug-05	-1.3	-0.4	-0.9	-3.4	0.6	0.3	0.3	-1.3
Sep-05	1.4	0.8	3.1	0.9	3.3	0.0	1.4	1.6
Oct-05	0.4	-1.3	4.6	-0.5	-2.5	-1.9	-2.7	-3.1

Table 8: Tourism Sector Indicators, Seasonally adjusted

Period	Employment in key industries in tourism sector ('000)					Hotel Industry ²		Consumer Price Index ¹	
	Total tourism related	Air transport ⁴	Accommodation	Food & beverage services	Arts, entertainment & recreation	Occupancy Rate (%) ³	Room Rate (\$)	Traveller accommodation	Restaurant food ⁴
Annual data									
2000	188.4	14.8	28.2	116.7	28.8	60.0	114.04	139.4	117.6
2001	190.5	13.5	29.5	117.8	29.8	59.3	116.13	133.4	121.3
2002	190.7	12.2	29.2	118.1	31.3	58.9	116.98	124.2	125.4
2003	192.8	12.7	29.0	117.7	33.4	58.3	113.73	111.8	127.6
2004	193.2	13.0	27.6	117.8	34.8	61.4	115.54	102.5	129.9
Annual Growth Rates									
2000	3.7	-3.3	-3.6	6.0	6.3	-2.8	1.8	4.7	1.8
2001	1.1	-8.7	4.6	0.9	3.6	-1.1	1.8	-4.3	3.2
2002	0.1	-9.7	-1.0	0.3	5.0	-0.6	0.7	-6.9	3.3
2003	1.1	4.4	-0.7	-0.3	6.8	-1.0	-2.8	-9.9	1.8
2004	0.2	2.2	-4.7	0.0	4.3	5.2	1.6	-8.4	1.8
Monthly data									
Oct-04	192.0	13.3	27.5	116.3	34.9	61.7	113.90	101.8	130.4
Nov-04	193.7	13.2	27.4	117.5	35.6	62.7	115.40	103.2	130.6
Dec-04	194.9	13.1	27.6	118.1	36.2	63.3	117.80	103.2	131.9
Jan-05	194.5	13.2	27.9	117.8	35.7	61.4	112.50	103.6	131.7
Feb-05	194.4	13.1	28.3	117.2	35.8	62.8	113.10	102.8	132.0
Mar-05	194.3	13.0	28.2	117.1	36.0	63.5	113.30	101.8	132.3
Apr-05	193.7	13.1	28.4	117.1	35.0	62.8	114.50	100.2	132.6
May-05	195.0	13.2	28.6	117.2	36.0	65.6	117.00	99.3	133.1
Jun-05	196.5	13.2	28.5	118.4	36.4	64.5	118.10	98.8	134.5
Jul-05	197.2	13.2	28.8	118.3	36.7	64.0	118.50	98.3	134.4
Aug-05	197.0	13.4	28.6	118.2	36.9	63.5	118.90	95.2	134.5
Sep-05	197.4	13.5	28.7	118.5	36.8	66.5	120.00	98.9	134.7
Oct-05	196.9	13.4	28.6	118.0	36.9	64.7	120.30	98.7	134.7
Month-over-month growth rates									
Oct-04	-0.5	1.2	-0.2	-0.4	-2.0	0.5	-1.3	0.5	0.3
Nov-04	0.9	-0.7	-0.3	1.0	1.8	1.0	1.3	1.4	0.2
Dec-04	0.6	-1.1	0.7	0.5	1.7	0.6	2.1	0.0	1.0
Jan-05	-0.2	1.3	0.8	-0.3	-1.4	-1.9	-4.5	0.4	-0.2
Feb-05	0.0	-1.2	1.8	-0.5	0.5	1.4	0.5	-0.8	0.2
Mar-05	-0.1	-0.7	-0.6	0.0	0.3	0.7	0.2	-1.0	0.2
Apr-05	-0.3	0.9	0.9	0.0	-2.6	-0.7	1.1	-1.6	0.2
May-05	0.7	0.9	0.5	0.1	2.8	2.8	2.2	-0.9	0.4
Jun-05	0.8	-0.3	-0.4	1.1	1.0	-1.1	0.9	-0.5	1.1
Jul-05	0.3	0.5	1.3	-0.1	0.9	-0.5	0.3	-0.5	-0.1
Aug-05	-0.1	1.0	-0.9	-0.2	0.3	-0.5	0.3	-3.2	0.1
Sep-05	0.2	0.7	0.5	0.3	-0.3	3.0	0.9	3.9	0.1
Oct-05	-0.2	-0.8	-0.3	-0.4	0.5	-1.8	0.2	-0.2	0.0

¹Source: Statistics Canada (Employment data from Survey of Employment Payroll & Hours) and BC Stats

²Source: Pannell Kerr Forster and BC Stats

³Occupancy Rate change expressed as percentage point change

⁴No identifiable seasonality.

Table 9: BC Restaurant and Tavern Receipts, Seasonally Adjusted

Period	Restaurants and Taverns ¹					
	Receipts (\$ million)					
	BC			Canada		
	Total	Drinking places	Food Services	Total	Drinking places	Food Services

Annual data

2000	5,079.6	505.6	4,574.1	32,568.0	2,487.5	30,080.5
2001	5,317.2	533.7	4,783.5	33,743.3	2,602.8	31,140.5
2002	5,403.0	546.2	4,856.8	34,527.9	2,610.2	31,917.7
2003	5,654.4	584.9	5,069.5	35,043.2	2,626.9	32,416.4
2004	5,960.2	625.0	5,344.1	36,670.1	2,707.4	33,962.7

Annual growth rates

2000	5.3	5.3	5.2	6.9	4.3	7.2
2001	4.7	5.6	4.6	3.6	4.6	3.5
2002	1.6	2.3	1.5	2.3	0.3	2.5
2003	4.7	7.1	4.4	1.5	0.6	1.6
2004	5.6	6.9	5.4	4.6	3.1	4.8

Monthly data

Oct-04	504	53	451	3,070	229	2,840
Nov-04	528	52	475	3,159	221	2,939
Dec-04	495	52	443	3,028	229	2,800
Jan-05	520	54	466	3,218	236	2,982
Feb-05	533	56	477	3,220	232	2,988
Mar-05	505	48	457	3,133	236	2,898
Apr-05	513	50	463	3,122	231	2,891
May-05	535	54	481	3,133	230	2,904
Jun-05	517	49	468	3,148	228	2,919
Jul-05	516	49	467	3,122	230	2,892
Aug-05	520	47	473	3,132	225	2,907
Sep-05	511	43	468	3,144	208	2,936
Oct-05	502	40	463	3,156	191	2,965

Month-over-month growth rates

Oct-04	-0.6	2.2	-0.9	0.0	0.9	-0.1
Nov-04	4.7	-2.0	5.5	2.9	-3.7	3.5
Dec-04	-6.1	-0.2	-6.8	-4.1	3.6	-4.7
Jan-05	4.9	3.0	5.1	6.3	3.0	6.5
Feb-05	2.6	4.2	2.4	0.1	-1.6	0.2
Mar-05	-5.3	-13.8	-4.3	-2.7	1.6	-3.0
Apr-05	1.5	2.4	1.4	-0.4	-1.8	-0.2
May-05	4.3	9.4	3.7	0.3	-0.7	0.4
Jun-05	-3.3	-8.9	-2.7	0.5	-0.6	0.5
Jul-05	-0.3	-1.0	-0.2	-0.8	0.7	-0.9
Aug-05	0.9	-3.9	1.4	0.3	-2.2	0.5
Sep-05	-1.7	-7.8	-1.1	0.4	-7.5	1.0
Oct-05	-1.8	-8.5	-1.1	0.4	-8.1	1.0

¹Source: Statistics Canada & BC Stats.

Explanatory Notes

Data Sources

All room revenue data reported is compiled by BC STATS using the hotel tax database maintained and administered by the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Traveller Entry data is from Statistics Canada. All other data sources are accredited within the report.

Accommodation Categories

Each property has been assigned to one of eight accommodation categories. In addition to motels and four sizes of hotels, there are three special accommodation categories:

Fishing Lodges – All inland and coastal fishing camps located on or near lakes, rivers and oceans. Includes lodges which offer inland fishing expeditions, marinas with accommodation and lodges offering the services of fishing guides.

Vacation Rentals – Includes beach houses, cabins, and selected trailer parks. May also include certain inns and apartment complexes.

Miscellaneous – Includes guest ranches; outfitting, adventure hunting and other types of outdoor adventure; lodges that cater to skiers, hikers, etc. (with the exception of those lodges that mainly service cabins); bed and breakfasts; and houseboats. Also includes universities, mining firms, farms and other establishments renting rooms whose primary activity is not accommodation.

Seasonally Adjusted Data

Accommodation revenue exhibits large, regular seasonal fluctuations, characterised by peaks in the summer months and troughs in the winter months.

The *Tourism Sector Monitor* report uses Statistics Canada's X11/ARIMA/88 technique to remove the effects of seasonality from the revenue time series. The resulting seasonally adjusted series provides a useful tool for the analysis of underlying trends in accommodation revenue.

Unless otherwise indicated, revenue data in the *Tourism Sector Monitor* report is adjusted for seasonal fluctuations.

Tourism Sector Monitor is prepared by BC STATS, Ministry of Management Services, using data from the Consumer Taxation Branch of the Ministry of Finance and Corporate Relations.

Limitations

The data reported here is derived from the hotel tax database. Tax is not payable for several kinds of accommodation, including:

1. properties with three or fewer rooms (such as small bed and breakfast operations);
2. room rentals exceeding one month in duration;
3. lodging where the daily rate is below \$20;
4. lodging supplied to passengers of a ship or train while the ship or train is in transit or is making a scheduled stopover in the Province;
5. lodging supplied by employers to employees; and,
6. lodging supplied to consular employees and their staff.

Readers wishing more information regarding the nature of the hotel tax are referred to the Hotel Room Tax Act and the Hotel Room Tax Regulations.

Room Counts

Data are obtained primarily from Tourism BC's *Accommodation Guide* and supplemented by estimates from the Consumer Taxation Branch's hotel tax file. Vendors and their rooms are not counted in any given month unless revenue has been reported.

Suppression

The protection of confidentiality requires the suppression of categories not containing at least four properties. In most cases, protection is achieved by aggregating confidential cells into larger categories.

Revisions

A standard revision cycle accommodates corrections to the source data, to the allocation of consolidated reporters, and to the coding of properties by accommodation type. Revisions are implicit in the seasonally adjusted data and in the month-over-month, year-over-year and year-to-date percentage changes of subsequent reports, and are comprehensively reported in the annual tables published in the Annual issue of the *Tourism Sector Monitor* report.

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